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ABSTRACT

This report describes a design, development, and demonstration project which was conducted by the Continuing Library Education Network and Exchange (CLENE) to formulate criteria for judging the quality of continuing education programs, and to design and demonstrate the feasibility of a nationwide voluntary approval system for providers of continuing education in the information, library, and media fields. The project was accomplished by a 7-member council of persons with continuing education expertise, a project staff, and a project evaluator. Drafts of project documents were written and distributed to the information, library, and media community for review and reactions; an open hearing was held to answer questions and receive comments; and a pilot survey of 13 providers of continuing education was performed to test the quality assurance criteria and the procedures of the provider approval system. Project background, objectives, methodology, results, and recommendations are presented in the report, as well as an evaluation of the project by an external evaluator. Extensive appendices include descriptions of two CLENE continuing education packages, guidelines and interview instruments used in the pilot survey; copies of documents presenting the quality assurance criteria and the provider approval system in their final form, applications for approval under the voluntary system, and other project forms and worksheets. (Author/ESR)

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Final Report

Project No. 475AH90020
Grant No. G007900364

Micki Jo Young, Ph.D., Elizabeth W. Stone, Ph.D.
Graduate Department of Library and Information Science
The Catholic University of America
620 Michigan Avenue, N.E.
Washington, DC 20064

A PROGRAM FOR QUALITY IN CONTINUING EDUCATION FOR INFORMATION, LIBRARY, AND MEDIA PERSONNEL

September 1980

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AUTHOR ABSTRACT

The Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System was designed through a research and demonstration project at the Department of Library and Information Science, The Catholic University of America in conjunction with CLENE (Continuing Library Education Network and Exchange), Inc. and was funded by the Department of Education under Title II-B of the Higher Education Act. The project was accomplished by a seven member council made up of persons with continuing education expertise, a project staff, and a project evaluator. Drafts of the Program were written and distributed to the information, library, media community for review and reactions; an open hearing was held to answer questions and receive comments; and a pilot survey was performed to test the approach and procedures. The purpose of the project and the Program is to upgrade the quality of continuing education activities and to institute a form of accountability to assure the quality, hence the Criteria for Quality and the Provider Approval System. The Program is one component of the CLENE Voluntary Recognition Service which includes the National Continuing Education Registry and the Statement of Acknowledgement for Continuing Education.

PREFACE

When Dr. Elizabeth Stone submitted the proposal for funding of this project, she did so at the request of the Board of Directors of the Continuing Library Education Network and Exchange (CLENE), Inc., who saw in it a means of designing and developing one of the major components of its Voluntary Recognition Service. This project, then, grew out of previous efforts and studies carried out by CLENE and will be part of CLENE's future endeavors in the area of recognition systems. The CLENE Task Force on Recognition Systems served as an advisory group for this project while working closely with the CLENE Board. Special thanks are extended to Dr. Ruth Patrick, Chair of the Task Force; and to Jim Nelson, 1980 President of CLENE, Inc.

The major work of this project was accomplished by a seven-member council plus a project evaluator and a four-person project staff. The group often functioned as a ten-member committee of the whole, closely supported by two administrative staff members. Committees are notorious for being unwieldy, hence largely ineffectual, in trying to create or design anything. Indeed, it is said that a camel is a committee-designed horse. In this case, the committee succeeded not only in designing a horse, but in designing a thoroughbred. What this group accomplished within the period of one year has taken other groups two to four years. Each person should take pride in a job well done.

We wish to acknowledge the cooperation and support given by other professional associations which have established recognition systems and/or approval systems. Many shared their materials and some gave of their time in order to answer questions and give guidance. Their contribution made our work more efficient in that it spared us from having to re-invent the wheel.

Finally, we wish to thank the many persons in the information, library, media community who gave us their views and comments. One hundred and fifty persons took time to write down their reactions to our draft documents and send them to us: another one hundred wrote to ask to be kept informed and to receive working materials as they were produced; twenty-five persons attended our open hearing; and ten organizations and three individuals participated in our pilot surveys. The information they gave and the interest they expressed made an invaluable contribution to the project.

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* As noted near the end of this report, the National Council on Quality Continuing Library Education decided, at one of its early meetings, to use *information, library, media* with the components separated by commas (not hyphens or virgules) and without the conjunction *and* before the third component.

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EXECUTIVE SUMMARY

Description of the Problem

In recent years there has been an increased interest in continuing education among members of the information, library, media community as a means to keep up with new developments and to maintain or develop their competencies. The continuing education offerings available were uneven in quality and effectiveness. There was a call from the field for something to be done to upgrade the quality of continuing education offerings and to institute a means for an individual to identify programs of worth "before the fact."

Objectives and Scope of the Study

Setting

CLENE, the Continuing Library Education Network and Exchange, Inc. is a national, professional association with the stated basic missions of (1) providing equal access to continuing education opportunities, available in sufficient quantity and quality over a substantial period of time to ensure library and information science personnel and organizations the competency to deliver quality library and information services to all, and (2) creating an awareness and a sense of need for continuing education of library personnel on the part of employers and individuals as a means of responding to societal and technological change. It was founded in 1975 as an outgrowth of a research study sponsored by the National Commission on Libraries and Information Science (NCLIS) and funded by the U.S. Office of Education. The same study identified an interest in a voluntary recognition system that included a provision for assurance of quality in programs.

CLENE, in cooperation with the Graduate Department of Library and Information Science of The Catholic University of America, got funding from the U.S. Office of Education in 1976-77 for a second research project, the results of which confirmed the interest in a recognition system, developed a model for a voluntary recognition system, and proposed an implementation plan. In October, 1977, the CLENE Board of Directors endorsed the concept of a voluntary recognition system for continuing education and accepted a leadership role in implementing such a system. A Task Force on Voluntary Recognition Systems was appointed.

The Task Force led discussions on the voluntary recognition service throughout the United States for over a year. Based on information gained from the field, a decision was made that of the major elements of a voluntary recognition system which include: (1) criteria and guidelines for quality continuing education offerings and/or total programs; (2) a voluntary approval system for providers and recognition of approved providers; (3) a voluntary recordkeeping system for each individual's continuing education and a way of recognizing these efforts; and (4) support services for the individual participants engaged in continuing education and for the providers of continuing education, the Criteria for Quality and guidelines for approval of providers of continuing education should be developed through a research project and the proposal for the present study was submitted to the U.S. Office of Education for funding under Title II-B of the Higher Education Act, specifically Section 223 which covers research and demonstration issues.

Objectives

In essence this was not a study but rather a design/development and demonstration project. The goals and objectives of the project and the activities undertaken to accomplish them (which were very close to the plan in the proposal) are as follows:

GOAL I. FORMULATE CRITERIA FOR QUALITY FOR CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

Objective 1. Establish a Council on Continuing Information, Library, Media Education.

- Task a. Prepared a list of attributes for the Council members.
- Task b. Submitted the criteria and a list of prospective members to the CLENE Board of Directors for their selection.
- Task c. Contacted the persons selected and invited them to serve on the Council.
- Task d. Developed a statement of charge to the Council and the tasks to be performed.
- Task e. Issued a call for the first formal meeting of the Council which included the time and place (July 20-23 at The Pasadena in Royal Oaks, Maryland). Called an orientation meeting in June at ALA in Dallas.
- Task f. Prepared background materials for the Council members and distributed them at the orientation meeting.
- Task g. Prepared tentative agenda for the first meeting including products to result. Made personal assignments for each member to prepare for the first meeting.

Objective 2. Produce a policy statement on continuing education which would include a definition of continuing education and set forth the ideal objectives of continuing education programs for information, library, media personnel.

Task a. Formulated a statement on definition of continuing education and other basic terms.
Task b. Ascertained and stated the ideal objectives of continuing information, library, media programs.
Task c. Defined the scope of the program to include the range of persons, subject areas, types of offerings, categories of providers, etc.,to be covered by the program.

Objective 3. Develop Criteria for Quality for continuing education programs compatible with the statement on ideal objectives for approved programs and with special emphasis on curriculum design. Design a mechanism for evaluating and approving providers of continuing education and/or their offerings based on the policy statement and the Criteria for Quality.

Task a. Made decision on elements to be considered for total programs of providers of continuing education.
Task b. Made decision on elements to be considered for individual course offerings and packaged programs.
Task c. Made decision on elements to be considered for independent learning activities.
Task d. Made decision on whether:

- Providers will be approved
- Individual courses/offerings will be approved
- Individual mentors will be approved
- Combination will be used

Task e. Formulated Criteria for Quality Continuing Information, Library, Media Programs.
Task f. Made a decision on the types of status and how reference to each status will be made.
Task g. Made a decision on how evaluation will be performed from such choices as:

- Individual evaluator visit
- Site evaluation by teams
- Application form completed and reviewed
- Self-study document prepared and reviewed
- Combination of the above

Objective 4. Develop a guide setting forth and explaining the objectives, the Criteria for Quality of acceptable programs, and the Provider Approval System, and distribute the guide to all institutions, organizations and individuals known to be concerned.

Task a. Developed a tentative draft of the guide, including definitions, objectives, Criteria for Quality and the Provider Approval System.
Task b. Submitted the draft to intense scrutiny by the profession by means of: (1) wide distribution of the document, and (2) open hearing for purpose of receiving comments.
Task c. Careful consideration by the Council of all comments thus gathered.
Task d. Prepared and distributed revised guide to all institutions, organizations, and providers known to be concerned.
Task e. Distribution of final statement in brochure form to all known to be concerned, and free upon request to others.
Task f. Devised a statement on way revision of Program, in whole or part, will be handled by the Council.

GOAL II. DEVELOP AND DEMONSTRATE THE FEASIBILITY OF A NATIONWIDE VOLUNTARY SYSTEM FOR APPROVING PROGRAM OF PROVIDERS OF CONTINUING EDUCATION.

Objective 5. Conduct pilot surveys of at least five providers of continuing education using the previously developed Criteria for Quality as the basis for evaluation and approval of existing programs and the design of the proposed Provider Approval System.

Task a. Made a decision on types of providers and categories of approval to be included in pilot survey.
Task b. Made a decision on locations in which to invite providers to participate in the pilot survey and expanded number to thirteen.
Task c. Developed procedures for site visit of pilot surveys such as the following:

- Amount of time to spend on visit
- Composition of the survey team
- Preparation of relevant printed material describing the purpose and procedures of the pilot survey for the provider's program director
- Preparation of an interview guide or instrument

Task d. Developed necessary forms for approval based only on paper records submitted.
- Designed Application for Approval forms
- Wrote guidelines and instructions for filling out the forms
- Decided on review mechanism for documents submitted
- Formulated ways of evaluating programs that have been approved

Task e. Performed the application and review process with thirteen providers.
- Circulated application forms which were completed by the providers
- Council members reviewed the forms submitted
- Council members discussed forms and voted on whether to award approved status
- Council prepared a written response to each provider notifying them of their status

Task f. Visited sites to discuss overall Program with director and to elicit information on their activities to validate effectiveness of the form and procedures.

Task g. Prepared a site visit report to distribute to other Council members.

Task h. Reviewed report and each application form at last Council meeting to verify decision on status and gain input on entire Program.

Objective 6. Finalize the policies and specific procedures for evaluating and approving programs and/or courses of continuing education based on experience gained during the pilot surveys and from information received from the field.

Task a. Based on the results of the pilot survey, prepared the final draft of the Program documents including the policy statement, Criteria for Quality, and the Provider Approval System.

Task b. Council and Project Staff recommended to the CLENE Board of Directors the fees involved in the Provider Approval System.

Task c. Based on the pilot survey, the application forms and guidelines were revised.

Objective 7. Produce, print, and disseminate "A Program for Quality in Continuing Education for Information, Library, Media Personnel: Volume One, Policy Statement and Criteria for Quality and Volume Two, Provider Approval System."

Task a. The document was prepared for printing by the Project Staff.
Task b. Supporting documents were prepared for distribution
Task c. The document or the factsheet was distributed to all organizations and bodies having an interest in continuing information, library, media education.

Objective 8. Formulate and announce the manner in which recognition of providers of approved programs and/or curriculum will be recognized.

Task a. Coordinated announcement with the existing publications of CLENE, Inc.
Task b. Coordinated announcements with the other components of the CLENE Voluntary Recognition Service.

- Authorized approved programs to use the VRS logo
- Designation of approved status will be carried within the records of the CLENE National Continuing Education Registry.

Scope of the Program

The definition of continuing education used for this project is "a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with information, library, media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn."

The scope of the Program covers (1) all persons who work in or with information, library, and media services, including those involved in governance, management, operations, delivery of services, and public relations; (2) a wide variety of learning opportunities, including both formal and informal learning activities which exist independently or under the guidance and sponsorship of various institutions, associations, and other organizations; and (3) subject areas broadly defined as appropriate, including all related disciplines that help participants to practice with competence in their present or future environments.

The entire Program is voluntary for both participants and providers. The Program does not:

- Issue Continuing Education Units (CEU's)
- Accredit programs or providers
- License or credential participants
- Provide quality control by "after the fact" review or evaluation.

Methodology

Approach

The approach to the project was one of forming a Council, to be supported by a project staff, to carry out the main design and developmental aspects, that is, to perform the creative, intellectual tasks. The Council was made up of persons with experience in information, library, media continuing education both as participants and providers with the exception of one member from an outside profession who had experience in setting up a similar provider approval system. The Council had three retreat-type working meetings plus three shorter meetings in connection with ALA gatherings. Additional work was done by means of correspondence and telephone conference calls. The work of the Council was then reviewed by the information, library, media community by means of widespread distribution of draft Program documents and an open hearing and tested/validated by pilot surveys of actual providers of continuing education.

Effectiveness

The overall project accomplished its stated goals plus an implicit overall goal of having the Program implemented and operational. This success can be attributed to the methodology utilized and the efficacy of the people involved in the process.

- The Council members met their meeting objectives due to excellent preparation of their assignments and diligent effort at the meetings.
- The Project Staff supported the work of the Council both in their office and out at the meeting sites so there were few delays due to clerical problems.
- The Project Evaluator was active throughout the project and gave advice throughout so adjustments could be made immediately, not months after the fact.
- The participants in the pilot survey gave the process their careful, considered thoughts and attentions and provided excellent comments and suggestions.

In all, the design of the Program grew and evolved through brainstorming, carefully prepared assignments, feedback from the field, and testing/validating the process and procedures. The drafts and versions of the Program documents show a healthy pattern of revision. Changes were based on educated experience, insight, and information.

During the project, there were only two changes or revisions in approach of note and these were not due to problems but rather from drawing on experience. The timing and sequence of events were altered from the plan in the proposal. On the advice of our outside consultant (the nonlibrary Council member with experience setting up criteria and an approval system in another discipline), the design and development of the Policy Statement, Criteria for Quality, and the Provider Approval System were undertaken as a whole (i.e., simultaneously) and all three were drafted at the first Council meeting. This led to a decision to defer the pilot surveys until the winter and have them validate not only the Criteria for Quality but also to test the policies and procedures of the Provider Approval System. Open hearings on the Criteria for Quality alone were dropped in favor of an open hearing on the Provider Approval System as well as the Criteria. To get the total design completed and documented prior to the Pilot Surveys, the second Council meeting was moved from January to October. The second change was of the locations of the Council meetings. All three were held in the Washington, DC area so that the Project Office and Staff could be moved to the site to support the writing efforts of the Council members during the course of the meetings.

Conclusions

The conclusions of this study are embodied by the "Program for Qualtiy in Continuing Education for Information, Library, and Media Personnel."

The Program features include:

- A wide scope of coverage in terms of types of information, library, media personnel; types of learning activities; types of providers; and numbers of subject areas included.
- Three categories of approval
  --approval of an organization as a provider of many programs and activities
  --approval of a single offering or activity of a provider
  --approval of a person to serve as a Learning Consultant to develop and monitor individualized programs for a participant with special needs.
- A provider approval system that uses a Council to review and award approval based on submission of detailed application forms and supplementary documentation.
- Use of the Criteria for Quality as the basis for reviewing programs and offerings.
- A term of approval of three years.
- Monitoring of approved providers and offerings during the three year term with Probation Status if quality should erode.

- An application fee/administration fee system to make the Program self-sustaining.
- A bilevel approach with a national council and state/multistate councils (approved by the National Council) dividing the work load of approvals.
- Coordination with the other components of the CLENE Voluntary Recognition Service.

The final products of this project, as a group, provide the total picture and details of the Program.

- "A Program for Quality in Continuing Education for Information, Library, and Media Personnel:
  Volume One. Policy Statement and Criteria for Quality
  Volume Two. Provider Approval System"
- (Fact Sheet) "A Program for Quality in Continuing Education for Information, Library, and Media Personnel"
- "Suggested Guidelines for State or Multistate Council Formation: Approval of Programs in Continuing Information, Library, Media Education."
- Application for Approval Forms and their Guidelines and Instructions for Individualized Programs and Activities for organizations and single offerings.
- Terms of Agreement for approved organizations, single offerings, and Learning Consultants.
- "CLENE Voluntary Recognition Service" (a summary statement)
- "CLENE Voluntary Recognition Service Information Booklet"
- National Council on Quality in Continuing Education for Information, Library,Media Personnel Provider Approval System Evaluation Form

Recommendations

The Council and Project Staff drew up recommendations and submitted them to the CLENE Board of Directors for the acceptance and implementation of the "Program for Quality in Continuing Education for Information, Library, and Media Personnel" under the auspices of CLENE, Inc.

1. The CLENE Board should adopt "A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality, and Provider Approval System" as CLENE policy.
2. The CLENE Board should begin immediate implementation (i.e., July 1, 1980) of the Provider Approval System according to the procedures outlined in the Program document and the implementation guidelines listed below.

3. The CLENE Board should adopt the logo for the total voluntary recognition service as the National Council's official provider logo.
4. The CLENE Board should authorize the Council to accept the providers approved in the pilot phase into the system as officially approved with a waiver of the review fee as stated in the Project proposal.
5. The CLENE Board should assume responsibility for providing Council staff either through assigning responsibility to the present staff or securing additional staff. Estimates of staff time needed and of costs are included in the budget statement.
6. The CLENE Board should develop a concept paper on Learning Consultants. Because the concept of a learning consultant is new and individuals may wish more guidance in their individualized, independent continuing education learning activities, the concept paper would aid in the development of learning consultants. The content could cover personnel interchange programs, learning consultant interaction, structured self-paced instruction, self-assessment techniques, and "other meritorious learning."

The recommendations were accepted by the CLENE Board of Directors on June 30, 1980.

CHAPTER ONE
INTRODUCTION

This project was funded and carried out under the title "Development and Demonstration of Criteria and Guidelines for Quality Control in Continuing Education for Library/Information/Media Personnel: A Provider Evaluation and Approval Program".

The grant was awarded to the Graduate Department of Library and Information Science, The Catholic University of America. Dr. Elizabeth W. Stone, Chair of the Department, was Project Director, and Dr. Micki Jo Young was Principal Investigator.

The project was one year in length and ran from July 1, 1979, to June 30, 1980, with a no-cost extension through September 30,1980.

Background and Related Research

Although the proposal submitted for funding this project was directed to the research and demonstration issues raised by the Higher Education Act, Title II-B, Section 223, this project can best be described as a "design/development and demonstration" project. The research necessary to give this project the foundation on which to build had been done previously.

This project represented, then, the culmination of a series of events, activities, and research efforts.

A nationwide survey of practitioners and providers of continuing education was conducted in 1973-74 by the Graduate Department of Library and Information Science, The Catholic University of America, and sponsored by the National Commission on Libraries and Information Science (NCLIS) with funds from Title II-B of the Higher Education Act. This study[1] found serious unevenness in the quality of continuing education and identified an interest in a voluntary recognition system that included a provision for assurance of program quality. This study also recommended the formation of the Continuing Library Education Network and Exchange (CLENE), which was organized in 1975, during the annual American Library Association Conference in

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[1] Elizabeth W. Stone, Ruth J. Patrick, and Barbara Conroy, Continuing Library Information Science Education, Final Report to the National Commission on Libraries and Information Science (Washington, DC: American Society for Information Science, 1974).

San Francisco, at a meeting called by NCLIS, which served as a catalytic agent. The first meeting of the CLENE Board of Directors was held in September, 1975.

A research project[1] carried out in 1976-77 by CLENE in cooperation with the Graduate Department of Library and Information Science of The Catholic University of America and funded by the U.S. Office of Education, confirmed this interest in a recognition system, developed a model for a voluntary recognition system, and proposed an implementation plan. The major elements of a recognition system were identified as (1) criteria and guidelines for quality continuing education in single offerings and/or total programs; (2) a voluntary approval system for providers and for recognition of approved providers; (3) a voluntary recordkeeping system for each individual's continuing education efforts, and a way of recognizing these efforts; and (4) support services for individual participants engaged in continuing education, e.g., the development of self-assessment tools, and for the providers of continuing of continuing education, e.g., a handbook to assist in attaining the Criteria for Quality.

In October 1977, the CLENE Board of Directors endorsed the concept of a voluntary recognition system for continuing education and accepted a leadership role in implementing such a system. A Task Force was appointed to develop a plan for the implementation of the recongition system.

The Task Force presented the concept of the recognition system to CLENE members at the ALA Midwinter, 1978, and then on June 1, 1978, to the members of a national invitational conclave, called by CLENE, on a voluntary recognition system. Both groups generally accepted the basic concepts of a recognition system and raised important issues and made suggestions relative to the implementation of such a system. At these two presentations, and at others that have been made at national, regional, and state meetings, a problem of deep concern to discussants, and one that has long been raised, is the necessity of some type of quality assurance mechanisms for continuing education offerings.

In November 1978, the CLENE Recognition Task Force made a presentation at the 1978/1979 CLENE/USOE Institute on Statewide Planning for Continuing Education. The Institute participants, as well as those at the Conclave, reaffirmed the initial positive response to the voluntary recognition system. Furthermore, discussion of critical issues, at the Institute and at the Task Force meeting which followed, led to a decision based on need from the field, that the most important of the major elements (listed above) in the voluntary recognition system was the development of Criteria for Quality and guidelines for approval of providers of continuing education. This recommendation led to the proposal submitted to the USOE Office of Library and Learning Resources for the present study, which was funded out of Title II-B HEA monies.

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[1] Elizabeth W. Stone, Eileen Sheahan, and Katherine J. Harig, *Model Continuing Education Recognition System in Library and Information Science* (New York: K. G. Saur, 1979).

Scope of the Project

The CLENE Voluntary Recognition Service has a two-fold purpose: to provide a mechanism for recognizing educational attainment and to build a system for encouraging better continuing education activities. As an outgrowth of the various research studies, public meetings, and committee activities, the Voluntary Recognition Service was designed around four components:

1. Criteria for quality continuing education activities and a mechanism for applying the criteria and for approving activities as meeting the criteria;
2. A recordkeeping system for each individual's efforts;
3. Recognition of individuals who regularly participate in continuing education activities; and
4. Support services to further advance the cause of quality continuing education through such activities as consulting, training, publications, and a clearinghouse.

This project was limited to the design and development of the first component, with the understanding that it must interact with the other components and must therefore be compatible with them.

For this project, continuing education was defined rather broadly as "a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with information, library, media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn." The scope of the project covered (1) all persons who work in or with information, library, and media services, including those involved in governance, management, operations, delivery of services, and public relations; (2) a wide variety of learning opportunities, including both formal and informal learning activities which exist independently or under the guidance and sponsorship of various institutions, associations, and other organizations; and (3) subject areas broadly defined as appropriate, including all related disciplines that help participants to practice with competence in their present or future environments.

Needs To Be Met

In recent years there has been increased interest in continuing education among members of the information, library, media community. As a result of rapid changes in technology, sophistication of procedures, an exponential rate in the growth of knowledge, and a growing demand for accountability in regard to information dissemination, people sought means to keep up with new developments and looked to continuing education activities to maintain or develop their competencies.

The demand for learning opportunities generated many continuing education programs in a helter-skelter manner, often without consideration of the actual needs of the individuals for whom the programs were marketed. The programs vary in form, character, and curricular design. The quality and effectiveness of these activities are very uneven. Some are over-priced and/or a waste of time and effort, while others are top-notch offerings. Continuing education opportunities are offered by a wide array of sponsors, including individuals as well as universities and schools, businesses and unions, governmental agencies, professional associations, hardware and software vendors, and employers of information, library, and media personnel.

The call from the field was for something to be done to upgrade the quality of continuing education offerings and to institute a means whereby people might identify programs of worth "before the fact".

As a result of this unprecedented and explosive growth of continuing education, there is now a clearly separable group of educational opportunities which proclaim assistance to practitioners who want to keep up-to-date with advances in the field and to refresh their knowledge of information obtained in earlier education programs. It seems only logical that this now separable segment of curriculum development, i.e., continuing education, should be subject to the same type of systematic evaluation and appraisal in relation to criteria for quality as has been developed to a high degree of effectiveness for graduate information, library, and media education leading to the master's degree by the Committee on Accreditation of the American Library Association. However, the Committee on Accreditation (COA of ALA) has continuously stated its position that it only accredits, and is interested only in accrediting programs leading to the master's degree, and is not interested in and in fact has no plans relating to the accreditation of continuing education courses and programs, i.e., activities other than established degree programs.

This, then, was the environment in which this project was initiated. The purpose of the project was to upgrade continuing education activities and to institute forms of accountability to assure quality. In improving the quality of continuing information, library, media education, especially in terms of curricular design, it sought to contribute to the ultimate goal of increasing the effectiveness of library [illegible] information services.

Two goals were stated for the project: (1) formulate Criteria for Quality for continuing information, library, media education, and (2) develop and demonstrate the feasibility of a nationwide voluntary system for approving programs created by providers of continuing education.

The importance of and the timeliness of the project can be shown by

- Examining what other professions have accomplished in upgrading their continuing education offerings through the development of criteria for quality programs and for policy and procedures for approval of providers of continuing education[1];
- Examining what has been happening to other professions in the assignment of credentials when there are no strong, viable continuing education schema which meet agreed-upon criteria for excellence[2]; and
- Examining the state library agencies and associations that are being pressured by their constituents to develop recognition systems with provisions for quality control of curriculum design.[3]

Providing now for nationally developed criteria and procedures for evaluation and approval of programs will result in a way to develop and maintain compatibility between a national system and any statewide or associationwide systems that may evolve.

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[1] Examples include medicine (Ruhe, 1971); psychology (Nygaard, 1976); pharmacy (Council on Pharmaceutical Education, 1976); engineering (Eisely, 1975); accounting (AICOA, 1976); and nursing (ANA, 1975).

[2] For examples, see: Moore, Donald E., Jr., (ed.) Proceedings Mandatory Continuing Education: Prospects and Dilemmas for Professionals, February 26-27, 1976. Champaign, Illinois: Office of Continuing Education and Public Service, University of Illinois, 1976.

[3] Examples include the Wisconsin Association of Public Librarians, 1978; the Michigan Interorganization Committee for Continuing Education, 1978; and the South Dakota State Library, 1978.

CHAPTER TWO
METHODOLOGY

The methodology for this project outlined in the proposal was, in the main, followed during the course of the project. Specific objectives were stated in relation to the two main goals. (See Figure 1) Detailed lists of tasks to accomplish required to accomplish each objective were included.

The approach to the project was one of forming a council to be supported by a project staff whose assignment was related to the main design and development aspects--that is, the creative, intellectual tasks. The work of the council was then to be reviewed by the information, library, media community and tested/validated by pilot surveys of actual providers of continuing education.

The proposal described a team approach to planning and management for this project between the Department of Library and Information Science of The Catholic University of America and CLENE, Inc., specifically its Board of Directors and its Task Force on Recognition Systems. The National Commission on Libraries and Information Science (NCLIS) gave the proposed project its endorsement.

The Project Staff

The Project Staff was composed of four persons: a Project Director, a Principal Investigator, a Research Associate, and a Project Secretary. A Project Office was established in O'Boyle Hall on the campus of The Catholic University of America. The Project Staff was responsible for directing the project, administering funds, managing work flow, supporting the council, coordinating with CLENE, Inc., maintaining liaison with NCLIS and the Department of Education, and handling all communications, including the production and distribution of project materials to the information, library, media community.

Dr. Elizabeth W. Stone, Chair of the Department of Library and Information Science, The Catholic University of America, and former Executive Director of CLENE, Inc., served as Project Director, committing 10% of full time to the project. Dr. Stone had served as Project Director for the earlier research projects upon which this project was based. Dr. Stone brought a wealth of knowledge and experience to the work of this project.

GOAL I. *Formulate Criteria for Quality for Continuing Library/Information/Media Education.*

Objective #1: Establish a National Council on Continuing Library/Information/media Education.

Objective #2: Produce and disseminate a policy statement on continuing education which would include a definition of continuing education and set forth the ideal objectives of continuing education programs for library/information/media personnel.

Objective #3: Develop *Criteria for Quality* for continuing education programs compatible with the statement on ideal objectives for approved programs and with special emphasis on curriculum design.

Objective #4: Develop a guide setting forth and explaining the objectives and Criteria for Quality of acceptable programs and distribute the guide to all institutions, organizations, and individuals known to be concerned.

GOAL II. *Develop and Demonstrate the Feasibility of a Nationwide Voluntary System for Approving Programs of Providers of Continuing Education.*

Objective #5: Conduct pilot surveys of at least five providers of continuing education using the previously developed Criteria for Quality as the basis for evaluation and approval of existing programs.

Objective #6: Formalize the policies and specific procedures for evaluating and approving programs and/or courses of continuing education, based on experience gained during the pilot surveys.

Objective #7: Produce, print, and disseminate *Guidelines for Evaluating and Approving Programs of Providers of Continuing Library/Information/Media Education Based on Criteria for Quality.*

Objective #8: Formulate and announce the manner in which recognition of providers of approved programs and/or curricula will be recognized.

Fig. 1. Project Goals and Objectives

Dr. Micki Jo Young served as Principal Investigator for the project on a 75% of full time basis. While sharing planning responsibilities with Dr. Stone, Dr. Young was responsible for managing the project and supervising the staff. Dr. Young contributed to the program design and development of the project, combining the expertise of a doctorate in educational technology and a master's degree in library science with her experience in developing training programs and workshops and her experience in library evaluations and surveys.

Mrs. Susan Viola was Research Associate and worked on a half-time basis. Mrs. Viola utilized her master's in library science in defining the universe of this project, i.e., both participants and providers from the information, library, media community. Mrs. Viola was responsible for administrative tasks of the project and the council, and worked with various units in The Catholic University of America who performed such specific functions as accounting, personnel, and payroll.

Mr. Will Adams worked full time as Project Secretary. Mr. Adams performed the clerical functions of the project and was specifically responsible for producing the final copy for all of the written documents and reproducing them for distribution, and cooperated with the Research Associate in conference logistics.

The Council

It was proposed that consultants be used for the project and that they be organized into a National Council on Continuing Information,Library,Media Education which would serve as a working group. The rationale for the selection of the consultants was stated as follows:

> The proposal has been written with an appreciation for the importance of communicating with potential users (providers of continuing education who would be using the Criteria for Quality and the guidelines for approval of programs) and reflects feedback obtained through contacts with users to insure that the results of the project are in a form most useful to the user communities. To expedite this communication, it is proposed that the Council contain members from the chief user groups and, wherever possible, selected by these groups. The chief user groups include three populations of providers: library education programs, library associations, and state library agencies. In addition, it has been the opinion of the CLENE Recognition Task Force that this Council should include at least one individual who has

had experience in other professions or disciplines in setting up similar criteria and guidelines for the quality control of continuing education programs.

The Project Staff worked with its advisory group, the CLENE Recognition Task Force, and prepared a list of prospective Council members which was presented to the CLENE Board of Directors. A matrix of attributes was prepared in order to arrive at a balanced, representative mix. The list of attributes included:

- library educators from associate-level, bachelor's-level, and graduate-level programs;
- continuing education specialists;
- library, information, media associations' staff, officers, and members;
- types of libraries, e.g., public, special, academic, school, and research;
- persons from a variety of geographic locations;
- persons representing diversity in age, sex, and racial/ethnic backgrounds;
- state library/media agency staff; and
- providers of continuing education activities.

Persons who had several of the attributes were considered most highly.

The CLENE Board of Directors, at its Spring 1979 meeting, considered the list of prospective members and selected seven persons to be invited to serve and several alternates if some were not willing to serve. The Project Director contacted the persons and invited them to participate on a no-fee, expense-reimbursement basis. All of the original seven accepted but one, whose supervisor did not grant permission to participate. An alternate was contacted and actually attended an orientation meeting before learning of a new, heavy job commitment which precluded his devoting time to the project. A second alternate was contacted and accepted a seat on the Council.

The final composition of the National Council is shown in Figure 2. The name for the Council as determined by the CLENE Board, was the "Council on Quality Continuing Library Education: Information--Library--Media Programs."

Ex officio members of the Council were named. The Project Director and Principal Investigator were named along with a repre-

Name of Council Member	Clientele Represented	Geographic Area	Additional Attributes
WILLIAM ASP Chairperson	Association officer --COSLA	North	State library agency. Former library school professor. CE provider.
BERNARD FRANCKOWIAK	Library Education program	West	Specialist in school media centers
JOHN HINKLE	Association member --Southwest Library Association	Southwest	CLENE Advisory Board. Continuing Education consultant for State Library Agency. CE provider.
JOHN G. LORENZ	Association director --Association of Research Libraries	East	Special libraries (L.C.). Research libraries. Information science.
MARGARET MYERS	Association staff --ALA	Midwest	CLENE Board of Directors.
DEBRA NYGAARD	Outside profession --American Psychological Association	South	Library users.
RUTH J. PATRICK	CLENE Recognition Task Force - Chair	Midwest	Academic libraries. Former library school professor.

Figure 2. Council on Quality Continuing Library Education

sentative of the National Commission on Libraries and Information Science, Mr. Alphonse Trezza.

Debra Nygaard, the member who represented an outside discipline, also served as a paid consultant. As Director of Continuing Education for the American Psychological Association, she had overseen the development of the APA's provider approval system and its initial implementation. Ms. Nygaard's firsthand experience in a a similar project was invaluable and enabled this project to proceed more expeditiously than it otherwise might have proceeded.

The Project Evaluator

The proposal called for use of an outside or external evaluator for the entire project. Although much of the evaluation of the results of this project can be done only in the future, when the planned mechanism is in place and operational, it was felt that an external evaluator working closely with the Council and the Project Staff during the course of the project would provide adequate preliminary review and would strengthen the areas of the program that dealt with review and evaluation.

The person named in the proposal as evaluator was unable to perform that role because of a shift of administrative responsibilities at her place of employement. She was replaced by Dr. Gary Purcell, Professor, Graduate School of Library and Information Science, the University of Tennessee. Dr. Purcell was formerly dean of a graduate library school and is a Past President of the American Association of Library Schools. Dr. Purcell has had extensive experience in self-studies and as a member of accreditation teams. His academic experience brought a rich background in curriculum planning and program design. He attended every meeting, gave advice and counsel to the Project Staff, and contributed to the Council's work as an ex officio member.

The Project Approach

Background Materials

As stated earlier, this project was an outgrowth of previous research studies and events and therefore began with a rich collection of resource materials.

First and foremost was the CLENE model itself, the Model Continuing Education Recognition System in Library and Information Science, which included a proposed implementation plan. There were background materials and summary information from the National Conclave on voluntary recognition systems. CLENE, Inc. publications were available, e.g., its Concept Paper series. Two of the CLENE Continuing Education Resource Packages, one on Nontraditional Learning Opportunities and one on Recognition Systems for Continuing Education, were particularly relevant. (See Appendix A.)

This resource material covered the information, library, media areas specifically as well as information from many other professions and disciplines that have done work in the areas of continuing education, recognition systems, and approval systems. There were six detailed examples of criteria for quality continuing education programs and numerous descriptions of provider approval programs used by other professions to deal with the problem of quality control.

At the beginning of the project, the Staff selected the most relevant resource materials, supplemented them with updated versions, and assembled a package of background material for each member of the Council. (A list of the contents of the package is found in Appendix B.)

Throughout the course of the project, the Staff provided additional resource material as it became available and/or it became pertinent. Council members were invited to share any materials they found to be relevant, and several did so throughout the year.

Assignments

In order to make most effective use of each member's time, assignments were made which gave each member specific areas to study and on which to prepare initial ideas as bases for further discussion. This technique compelled everyone to participate and contribute actively, and assured even coverage of all topics and areas.

The assignments were prepared by the Staff, chiefly in consultation with the Council Chair and Project Evaluator. Additional background information was provided if necessary, and reference sheets to relevant sections of the resource package were distributed to support individual assignments.

The Council was to a member extremely diligent in preparing their assignments, and much of the credit for the successful achievement of the goals and objectives of the project can be attributed to this fact.

Assignments for the project are listed in Appendix C

Meetings

The proposal called for three major meetings of the Council. Each was to be about three days in length, with travel and other expenses to be paid for from project funds. It was also proposed that these meetings be held in different sections of the United States, with the possibility of combining them with open hearings on the program. The CLENE Task Force suggested, however, that at least the first main meeting be held in a retreat-like environment so that the maximum time could be spent working together on the task at hand. This approach proved to be extremely effective, and all three meetings were in a retreat atmosphere.

In June 1979, before the project officially began, an orientation meeting was held for those Council members who were present in Dallas for the American Library Association Conference. Over a breakfast of coffee and rolls, the Council members were introduced to each other, with short sketches of each one's background and experience. The charge to the Council (taken from the proposal) was read, and the time schedule for the year-long project was reviewed. The packages of background resource material were handed out. The time and location of the first meeting was announced. The information imparted verbally at this meeting was written up and mailed to the Council along with the individual assignments for the first meeting. (See Appendix C.)

The first meeting was held July 20-23 at the Pasadena Conference Center in Royal Oaks, Maryland, approximately 110 miles from Washington, DC. The Staff rented a van, made the rounds of the airports, gathered up the Council members and headed over the Bay Bridge during a Friday evening rush hour in a hot summer rainstorm) and down the Eastern Shore to Royal Oaks. Following dinner, there was a short meeting to review the agenda and to distribute additional materials brought by various council members. The next morning, the Council and Staff gathered for breakfast at 8:00 A.M., and immediately thereafter convened the first session. For two days the group worked from 9:00 A.M. to 11:00 P.M. with only short breaks for food. The third day proceeded in the same fashion, with work sessions continuing on through lunch, halting finally just before the van was loaded to return to the Washington airports. The range of topics covered and the amount of work accomplished were voluminous.

To support the work of the first meeting, the purpose of which was mainly to compose drafts of the first two program documents, the Project Office was moved almost in its entirety to the Pasadena Conference Center. With as many as three typewriters (manual and electric) going at once and with the use of reams of paper and boxes of carbon paper, the Project Staff kept up with the writing efforts of the Council, and passages were returned within the hour, and entire drafts produced overnight for review the next morning. This clerical/administrative support greatly expedited the work of the Council. This clerical/administrative support was so valuable that the next two meetings of the Council were held in the Washington, DC area so that the Project Staff and Project Office equipment could be available for subsequent meetings.

The second main meeting was held October 26-29 at the Manresa Retreat Center in Annapolis, Maryland. The third main meeting was held May 2-5, 1980, again at the Pasadena Conference Center in Royal Oaks, Maryland. The schedule and agenda were no less hectic for each of these meetings, and the accomplishments were equally good. The technique of performing the major work of the project at three-day, retreat-like meetings was found to be very successful when coupled with pre-meeting assignments and the support of the clerical staff during the meetings. Only a small percentage of the work was accomplished via the mail, although the Staff made frequent use of mailings between meetings to keep the Council informed.

A nonfunded meeting was held in January 1980, during the ALA Midwinter Meeting in Chicago, for those members of the Council who were attending that event. An open hearing was also held as a Midwinter event, and Council members conducted the meeting. The final meetings for the project were also unfunded and were held at the ALA Conference in New York at the end of June and the first of July. Those Council members present for the conference attended. It was found that meeting in conjunction with the ALA Conference and/or Midwinter Meeting can be productive and cost-effective, although certain members cannot attend every meeting because of schedule conflicts and, indeed, some Council members are not affiliated with ALA and therefore do not attend the conference at all.

Documents and Distribution

Two of the eight main objectives of the project called for the development of a guide--a formal printed product for public consumption. The Council chose to express the results of their work directly in the form and format of public documents, in lieu of expressing the design and details of the program being developed in the form of a "general policies and procedures statement" from which a public brochure or handbook could be written. At each meeting, drafts of the documents were written and reproduced in a format that closely approximated the final printed form. For the first version, produced in August, there were three separate documents:

Document One: Policy Statement on Quality Continuing Library--Information--Media Education

Document Two: Guidelines for Quality Continuing Library--Information--Media Education

Document Three: Procedures for a Voluntary Continuing
Library--Information--Media Education
Approval System

The relationship among the three documents is shown by the diagram in Figure 3.

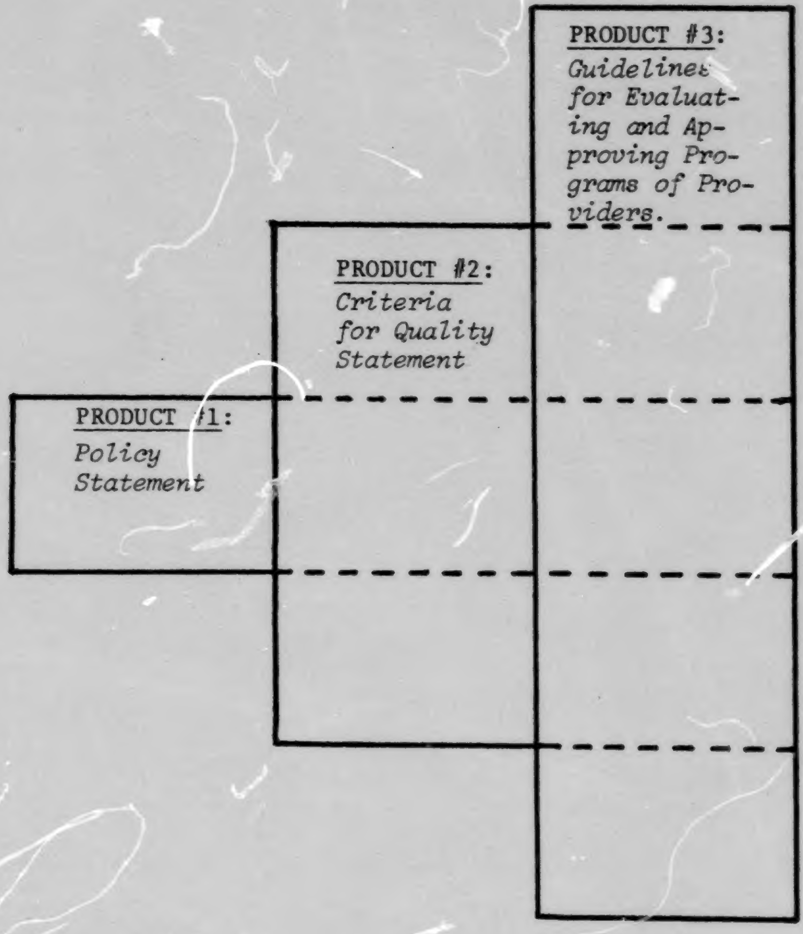
PRODUCT #3:
Guidelines for Evaluating and Approving Programs of Providers.
PRODUCT #2:
Criteria for Quality Statement
PRODUCT #1:
Policy Statement

Figure 3. Relationship Among the Three Documents

Based on the products of other approval systems, it was felt that there would be different audiences for the three parts of the program and that the preparation of separate documents would therefore save printing and distribution funds. There was also a desire for efficiency in the sense that a reader should have all the information needed at hand, and should not have to refer constantly to another document. Therefore, Document Two included the Policy Statement of Document One, and Document Three contained both the Policy Statement and the Criteria for Quality. (See Figure 3.)

The proposal gave considerable attention to the importance of dissemination activities during the course of the project. On the one hand, this served as a means of evaluating the work of the project as it developed, but even more importantly, this furthered the impact of the project based on knowledge utilization theory. The main technique used to establish communication with the information, library, media community was that of mailing out copies of the drafts of the program documents to a large group of persons.

The universe or target population for this project included both the providers of continuing education activities and the participants (learners) from throughout the entire information, library, media community. A mailing list was assembled to represent as comprehensively as possible the entire target population. In its final form, the list numbered almost 700.

The target population was broken down into the following categories:

1. CLENE, Inc. members who served on the Board of Directors, the Advisory Committee, the Task Force on Voluntary Recognition System, and the State Institute Advisory Board;
2. Participants from the CLENE national Conclave on Recognition Systems and the 1980 CLENE State Institute;
3. The president or a representative of every major national-level professional association or organization;
4. The head of every state library agency;
5. One state media supervisor from each state;
6. The president or a representative of each state school media association;
7. The president or a representative of each state, regional, or local library association;
8. A representative of every academic institution that has a graduate program (accredited or unaccredited), a bachelor's program, or an associate-level program in library science.

9. Representatives from the networks and from the major vendors.

10. Individuals who are active in the continuing education area and individuals who participated in the ALA Continuing Education Policy Development Forum.

The representatives from the associations, schools, and state agencies were asked to review the documents from the standpoint of being potential providers of continuing education and from the standpoint of their members/constitutents being potential participants in continuing education activities.

Version 1 of the program documents was distributed, in August 1979, to almost 500 persons. Version 2 of the program document (Document #3) was distributed, in December 1979, to almost 400 persons. Almost 700 persons received either the final verion of the program document or a fact sheet describing the program in June 1980.

Several techniques were used to prompt readers to react to the documents, not just read them with passing interest. The first version was printed with a Notes and Comments column on every page. The second version was printed on legal size paper with a Notes and Comments column and each sentence numbered for reference.

Over 150 persons responded to the first version and mailed back to the Council their comments and reactions. About a dozen persons gave written responses to the second version.

Open Hearing

Another means of communicating with the information, library, media community was to sponsor an open hearing. An open hearing was scheduled through the American Library Association office and was an official event at the ALA Midwinter Meeting in Chicago on January 23. Through press releases, individuals were invited to meet the Council and the Project Staff and give testimony and/or ask questions on the program as it was represented in Version 2 of the program documents, which had just been distributed. Over 20 persons attended.

Pilot Surveys

The first objective under the second goal of the project (Objective #5) was to "conduct pilot surveys of at least five providers of continuing education using the previously developed Criteria for Quality as the basis for evaluation and approval of existing programs." The proposal described the process as follows:

In order to facilitate and give validity to the beginning of formal approval procedures, pilot surveys will be conducted to work out specific mechanisms for obtaining pertinent information. The pilot surveys will be made by the Project Staff and appropriate consultants from the Council so that formal mechanisms for carrying out appraisal procedures can be developed.

By the end of the second formal meeting in October, the basic design of the provider approval system was complete and the final approach for the pilot surveys was determined. Each provider selected would be asked to apply formally for approval; the Council would review and evaluate the application and decide whether or not to award Approved Status to the provider. A site visit would then be made by a Council member and a Project Staff member designated to interview the responsible person to gain his/her views of and reactions to the Criteria for Quality and reactions to the procedures of the Provider Approval System. The visit was to evaluate the program, not to evaluate the provider.

Because of the numbers of categories of approval (four in all) and the various types of providers that were identified, it was decided to expand the number of pilot survey participants from five to as many as twenty. Twenty potential participants were identified by the Council and Project Staff and were invited to participate, each receiving a packet of preliminary documentation and planning papers for his/her consideration. (See Appendix D.) The final number of participants was thirteen.

The participants completed their application forms in February and March. Each Council member received copies of all thirteen applications. Conference calls were made between the Council members and the Project Staff to discuss the applications and give preliminary approval or disapproval to the applicant. Specific questions for each participant were identified to be covered during the site visit. The site visits were held in March and April. Five of the seven Council members participated in at least one site visit. A brief interview instrument was used so that each visit would be parallel and comparable. (See Appendix E.) Each person who made the site visit wrote up the information given and impressions gained, and these were distributed to the other Council members.

At the final meeting in May the Council reviewed each application in detail and discussed the site visit for each pilot survey participant. A vote was taken whether to award Approved Status to each.

Summary

This chapter has described the various methods and approaches utilized in this project. Details of the results are set forth in the next chapter, as are the conclusions which were drawn from the project.

CHAPTER THREE
RESULTS--FINDINGS--CONCLUSIONS

The report preparation guidelines state that "the conclusions should highlight what was or was not accomplished in the study". For this design/development and demonstration project what was accomplished was A Program for Quality in Continuing Education for Information, Library and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System. All of the results and findings of the project are embodied in the Program.

The Design

Although the Model Continuing Education Recognition System and its proposed implementation plan existed, the Council was not asked to, nor did it, in fact, rubber stamp any preconceived design. Instead it was armed with extensive background material and asked to do its homework. In the General Comments and Instructions Relative to Meeting #1 at the Pasadena Conference Center, the following advice was given:

Suggested Procedure in Preparation for Meeting #1

1. Start with the Model
2. Review other resource material
3. Synthesize into a position
4. Prepare draft sections of product(s) for which you are responsible (according to the individual assignments)
5. Come to The Pasadena prepared to lead the discussion of the section(s) for which you are specially responsible.

The range of topics for individual assignments is indicative of the scope of the project:

Definition of continuing education as a concept
Specific meaning of terms (glossary)
Scope of content, or range of activities included
Eligibility
Goals and objectives
Need for continuing education
Why recognition for practioners in CE
Rationale: Why an approval system for providers of CE
Individual, independent self-guided learning activities: objectives, needs of target audiences, methods of learning, credit/time/measurement
Critieria for Quality for providers of CE programs/ activites including individualized CE programs: objectives, target audiences, credit/time/measurement, methods of learning, program planning, evaluation, consideration of and meeting of student needs

Criteria for Quality for providers of CE programs/activities--organization and administration, including such components as administration, budget, facilities, faculty/instructors, educational content development, delivery systems (ethical marketing), instructional methodology, and evaluation

Guidelines and their implementation, i.e., responsibilities of the Council in applying the criteria in approving individualized activities, providers of standard continuing education programs, as well as independent self-learning activities

Consideration of issues: mandatory vs. voluntary CE; inclusion of study taken towards degrees; programs vs. individualized activities; how to measure, including use of the CEU; articulation with state programs such as those of Michigan, South Dakota, and Wisconsin.

Version 1

By the end of the first meeting, the Council had written the Policy Statement and Criteria for Quality and the basic framework and rationale of the Provider Approval System had been formulated. The important features of the design, as stated in the first version of the program documents, included:

Definition of Continuing Education. A broad definition was used to include any education after the preparatory education necessary for involvement in or with information, library, media services. This includes staff development and courses taken toward the next degree. It includes both formal and informal learning activities.

Scope of the Program. The scope was inclusive to cover all persons who work in or with information, library, media services, e.g., all levels of staff, volunteers, Friends, trustees, etc. Information and media areas were specifically included and the decision was made to spell out all three segments every time it was mentioned. No slashes or dashes were to be used; the three terms were to be written in alphabetical order set off by commas with, in most cases, no use of the conjunction"and".

Subject Areas of the Program. The subject areas of continuing education activities that would fall under this program were broadly defined as anything appropriate, including all related disciplines, that help participants to perform with competence in their present or future environments.

Form of the Criteria for Quality. Each criterion was in the form of a declarative sentence and was accompanied by assessment factors in the form of questions that illustrate the scope of the criterion and suggest the level or degree to which each should be applied.

The Provider Approval System will be voluntary. As opposed to being mandatory, the provider approval system will be voluntary for both providers and participants. It is not a part of an accreditation program nor is it a means to license or credential a participant. If a state, association, or system wishes to incorporate the results of the approval process thus, it must do so independently of the Provider Approval System.

The Council. The Provider Approval System will be administered by a national council which will review and grant approval to providers of continuing education activities. The Criteria for Quality will be the basis for deciding whether a program or activities should be approved.

Types of Programs and Activities. A wide range of programs and activities can be approved. Examples of group learning activities include institutes, workshops, seminars, short courses, conference programs and academic offerings, e.g., academic courses, academic independent study, internships or practica, and education for advanced degrees or certificates. Examples of individualized programs and activities include correspondence courses, Home Study courses, mediated learning modules, computer-assisted instruction modules, programmed texts, and non-academic internships.

Independent Learning Activities. It was recognized that some persons may for a variety of reasons choose to pursue independent learning activities. In order to facilitate quality, verify accomplishment, and signify approval of these activities, the concept of a mentor, called an advisor-monitor in Version 1, was introduced. Under the guidance of the mentor, such informal learning activities as follows could be part of a formal learning plan for an individual and therefore approved: participation in study groups, lecture series, journal clubs, library personnel interchanges, and internships, or preparation of books, journal articles, speeches, conference programs, courses or workshops, or exhibits.

Categories of Approval. There are three categories of approval.

1: Single Offering: A provider may apply for approval of a specific single offering or activity.

2: Organizational: A provider may apply for approval of all the activities and offerings in its entire continuing education program. Emphasis in this type of approval is on the provider's administrative structure and resources in order to determine its capability and willingness to apply the Criteria to each of its offerings.

3: Advisor-monitor: A person may apply for approval to work as an advisor-monitor with individuals in one-to-one independent learning activities. (This title was subsequently changed to Learning Consultant.)

Types of Providers. Many types of organizations and institutions can be providers or sponsors of continuing education activities: information, library, media education programs; national information, library, media associations; state, regional, and local information, library, media associations and organizations; state agencies responsible for information, library, media programs and services; networks; consulting corporations; proprietary organizations (vendors, suppliers, or brokers), libraries or library systems; and individuals, e.g., independent consultants.

Responses to Version 1

When the reactions and comments of the 150+ respondents to the first version of the program document were reviewed and analyzed, certain facts emerged.

There was strong approval of the Criteria for Quality and an indication that all stated criteria were considered important.

There was a need expressed for specific criteria to be developed for individualized, or self-learning, activities and for advisor-monitors as providers.

There were divergent opinions on whether nontraditional learning activities undertaken by individuals should be included as continuing education activities or considered part of routine professional responsibility.

There was confusion as to the role of advisor-monitors and as to how this concept might be developed. There was a negative reaction to the name "advisor-monitor".

The responses were divided according to category of the target population, but no major patterns or differences of opinion were discovered among the various types.

Version 2

At the conclusion of the second meeting, the Council had completed the design of the Provider Approval System and had revised the Policy Statement and Criteria for Quality in view of the reactions to Version 1. A single program document was written entitled "A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System." It represented a completed and revised version of Document 3.

Several areas of the first version were either revised or reaffirmed:

The concept of individualized study under a mentor was retained but the title for such a person was changed from Advisor-Monitor to Learning Consultant.

The nontraditional learning activities were retained as subject to approval when performed as parts of learning plans under the guidance of Learning Consultants.

New Criteria for Quality were added so that the final Criteria included (1) criteria for specific types of continuing education programs and activities e.g., group programs and activities, individualized programs and activities, and such instructional materials as teaching aids, mediated delivered programs, and self-instructional materials, as well as (2) criteria for types of continuing education providers, specifically those who provide activities for groups and those who serve as Learning Consultants on a one-to-one basis.

The completed design of the Provider Approval System contained several important features which were added to the original features:

The National Council will be an autonomous entity which will operate under the auspices of CLENE, Inc.

The Provider Approval System will seek to be self-sustaining by means of a fee structure for the providers.

Approval will be by means of an extensive written application which is reviewed by the Council. A vote will be taken as to whether or not to award approval. An appeal process will be established for those providers who are disapproved and wish to challenge decisions.

The length of terms of approval is three years.

Monitoring of programs and/or activities will be undertaken during terms of approval by various means. One method will be an annual report to be submitted to the Council.

There will be a bi-level approach to approval. Besides the National Council, it is strongly urged that states or multistate regions form councils to be integral components in a coordinated national provider approval system. A state or multistate council would apply to the National Council for approval to serve as a delegate to the National Council to review and approve certain continuing education organizations, all single offerings, and all Learning Consultants in its geographic area. The National Council will approve certain types of sponsoring organizations and all categories for states that have no councils.

The Provider Approval System will tie into the CLENE, Inc. Voluntary Recognition System in several ways. Approved providers will be listed in the CLENE Continuing Education Communicator and the annual Directory of Continuing Education Opportunities for Library, Information, Media Personnel. A special symbol will be used to identify programs as approved. Providers will be required to participate in the CLENE National Continuing Education Registry by administering the entry of the record for each participant in the offerings or activities which it wishes to be listed in the Registry. The contact hour will be the basic unit of measure for all offerings and activities; this will allow each participant to qualify for a Statement of Acknowledgement of Continuing Education if he/she so desires.

The Test

Once the design of the program was complete and written down as Version 2 of the program document, the first drafts of application forms and annual report forms were prepared by the Project Staff. This was the last preparatory step required before initiation of the pilot surveys.

The Council felt that the process should be tested under as many conditions as possible to validate it. A matrix was prepared to analyze the potential population of providers. (See Fig. 4)

	Organizational Approval	Single Offering Approval	Learning Consultant Approval	State Council Approval
Academic Institution				
Graduate Program	X			
Bachelor's Program	X			
Associate's Program				
Extension Program	X			
State Library and/or Media Agency		X		
Organization or System				
Professional Association				
International	X			
National	X			
Multistate				
State		X		
Local				
Network				
Information System Supplier/Vendor/Broker	X			
Individual			X	
State/Multistate Council				X

Figure 4. Matrix of Providers in Pilot Survey

By selecting providers located in the general vicinity of one of the Council members, the funds for travel could be extended to cover more than the original five pilot surveys called for in the proposal.

Several of the providers were scheduled to seek approval for single offerings but subsequently chose to apply for approval of their entire program. The final count was one State Council, three Learning Consultants, two Single Offerings, and seven Organizational Approvals.

The Application Forms

For each category of approval an application form was prepared to cover those parts of the Criteria for Quality that were pertinent. The single offering application asks for specific details about the offering, how it was developed, and how it is to be given. The organizational form is more general and seeks information on how the program is administered, what resources are available for the program, and what approaches and procedures are used to develop and present offerings. The Learning Consultant form is also general as to approach and administration. The State Council form asks for background information on the constitutents of the state and seeks information as to how the State Council will operate.

All of the application forms were lengthy. They provided room on the form for answers/information to be written. There were many checklists used. A certain amount of educational jargon was used in each form. An extensive set of guidelines and instructions was written for the single offering form because it was felt that more laymen (that is, those without much training in education) would be sponsoring and applying for approval of single offerings than for any other category. Definitions were given and illustrations were provided for this form. The questions on the Organizational and Learning Consultant forms were written in such a way that the instructions were self-evident or self-contained. It was felt that any provider that had a large enough program to qualify for organizational approval would have persons available who recognized and were familiar with the educational jargon, e.g., individualization, needs assessment, learning objectives, performance measures, and instructional strategies. The State Council form had guidelines and instructions to indicate the scope of the questions asked because this was an entirely new area.

Each pilot survey provider filled out an application form. In reviewing those forms it became clear that some of the rationale on which the form design was based was inaccurate and that some of the specific questions were inadequate. This knowledge was used, along with information obtained during the site visit interviews, in revising the forms.

Site Visits

The site visits to the pilot survey providers were a key element in the whole project. They provided a means for two-way communication, a means for direct feedback, a means to gain exposure for the project, and a means to validate and evaluate the entire program as well as the procedures of the Provider Approval System. The plan was to have one Council member and one Project Staff member visit each site. Because of the number of participants, distances involved, and time constraints, this pattern was not alway followed. The visits actually followed these patterns:

Project Director and Principal Investigator = 3
Project Director and Council Member = 1
Principal Investigator and Council Member = 4
Principal Investigator and Project Evaluator = 1
Principal Investigator = 2

Five of the seven Council members participated in at least one site visit each. (One member was out of the country during that time, and the member from the outside discipline was not asked.)

A simple interview instrument was prepared to structure the information covered. (See Appendix E.) The topics ranged from the Criteria for Quality and the Provider Approval System as a whole, to the specific questions on the application form. The team sought to verify the information elicited via the form about specific offerings or programs but did not evaluate the provider directly. The provider was asked to evaluate the Program.

The Findings

The characterization of the thirteen persons interviewed covers a wide spectrum: from friendly to skeptical, almost hostile; from supportive to only mildly interested; from knowledgeable to naive and inexperienced; from conscientious to blasé. In every case, however, much valuable information was gained and for the most part, constructive marketing was accomplished.

The major findings from the pilot surveys can be summarized as follows:

> The Criteria for Quality were seen as comprehensive and well conceived. There were no suggestions for elimination of any criteria or for additions to the list. There were questions as to level or degree of compliance or attainment that would be required for the approval process. One person suggested that actual numbers or quantities be given for each.

The Criteria for Quality were seen as likely to be extremely useful as a planning tool or yardstick for developing continuing education activities and programs.

The Provider Approval System was deemed worthy and workable. Some people felt that approval of each specific single offering would assure quality better than organizational approval.

Most stated that they would participate in the Provider Approval System when it was implemented although they would have to pass the cost of the system on to their participants.

The single-offering approval turnaround time is critical and must be as short as possible because of the nature of the planning cycle for such activities.

The Learning Consultant concept is not readily understood, although when it is carefully explained, it is received favorably.

The filling out of the application form was a learning experience and very beneficial in focusing on one's program (or offering) and its overall operation.

The length of time required to fill out the application form varied from two hours to two weeks. It depended on how organized their work was. In all cases, it was predicted that the next time, i.e., at renewal, it would take less time because they would structure their data beforehand in the appropriate way.

The forms were considered long and complicated, but there were few suggestions of specific questions to be eliminated. Some suggested a shorter, more open-ended form, but others said additional lists and prompts would be of value. It was agreed that if the information requested was in existence in another format, it would be helpful if it could be appended and not restructured.

In most cases it was felt that Guidelines and Instructions were or would be of value. Some persons used the Guidelines for the single offering application as an aid to filling out the organizational application, which had no instructions.

There was some hesitancy if not refusal to provide budget and fiscal information. In most cases, there was a specific request for confidentiality.

It was common for providers to contract for course development and/or development and presentation of units of an offering. There seemed to be only loose control and little accountability between the sponsor and the contractor.

When an organization co-sponsored an offering there was little consistency as to responsibilities and accountability.

One provider was completely unwilling to participate in the CLENE National Continuing Education Registry, and a second provider was extremely hesitant to commit to participation.

It was the common opinion and expectation that the Council should provide help at least in the form of referrals to providers who had deficiencies or weaknesses in certain aspects of their programs or offerings. Merely stating that they fell short in certain areas or even saying in what way was not enough. The providers felt that a remedial type of service should be available either from the Council or from CLENE, Inc.

These findings were given careful attention and consideration by the Council when the final revision of the Program was undertaken.

The Approval Process

To carry the entire approval process through the whole cycle, the Council actually reviewed each pilot survey providers' application and voted on whether to award Approved Status. The formal review was done at the third meeting in May, actually after the site visits. Preliminary reviews had been done via conference calls before each visit.

Eleven of the thirteen applicants were awarded Approved Status. All thirteen were written letters that pointed out areas that needed improvement as well as areas that were exemplary.

The Council and the Project Staff gained from the experience, and certain additions and changes to the Program can be traced directly to the pilot survey experience.

Participation in the CLENE National Continuing Education Registry, Continuing Education Communicator, and Directory is urged but is not mandatory.

Single offerings are to be reviewed by a three-person subcommittee, not the entire Council. The decision for Approval will be accepted by the Council. Any disapprovals will be reviewed by the entire Council.

A statement of policy on co-sponsorship and contracting was added to the Program document.

Application forms were reviewed and revised. Guidelines and instructions were added for all. A short form for the single offering was added as an option to the long form.

A Terms of Agreement was drawn up for each category to spell out the rights and obligations of an approved provider.

A decision was made to keep confidential all information provided to the Council.

A procedure for requesting more information from an applicant was devised when in the course of reviewing the application, it was felt that there were unanswered questions.

The Final Program

At its third and final working meeting, the Council revised the Program into its final form. The Council used the information and insight gained from reactions to the second version of the document, from the participants at the Open Hearing, from the pilot survey providers, and from their advisory groups, the CLENE Board of Directors and the CLENE Task Force on Recognition Systems.

Additions and changes to the Program can be summarized as follows:

The relative scopes of the National Council and State Councils were redefined. Before, the criterion had been the scope of the subject content and the audience to whom it was directed. This was seen to be difficult to apply; the areas were therefore defined by category of approval and type of provider. The State Councils would handle all single offering applications and all Learning Consultant applications in their areas. They would handle approval of local organizations and agencies only, e.g., individual libraries or library systems and multi-county and local information, library, media organizations or associations. The National Council would handle all other organizational applications, including statewide information, library, media associations or organizations and library education programs.

A policy statement on co-sponsors and contracts was written and added to the Program document. It specifies that the approved organization is responsible for assurance of compliance with the Criteria for Quality no matter who actually performs the various functions.

The participation by approved providers in the CLENE, Inc. Voluntary Recognition Service is urged but is not mandatory.

The CLENE Voluntary Recognition Service logo was accepted as the official logo designating Approved Status for use by approved offerings or providers.

> The number of members on the National Council was increased to nine and the attributes of the Council membership were described.
>
> The jurisdiction and responsibilities of the National Council and the CLENE Board of Directors were spelled out.
>
> It was decided that a state council could be approved to handle only certain types of applications if it so desired, as opposed to all categories spelled out in the Program.

The Program is final only in so far as this project is concerned. It is hoped and planned that the Program will be implemented and carried on in the future. As such, it will be constantly evolving. The final version of the Program, which is the product of this project, is found in the program documents, the forms, the Council procedures, and the recommendations to the CLENE Board of Directors.

Program Documents

The main program document, "A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System" was written for use by the target population of the Program, the providers of information, library, media continuing education. It is in two volumes: Volume One, Policy Statement and Criteria for Quality; and Volume Two, Provider Approval System. (See Appendix F.) The Program Document was distributed to all those who participated in the study, as well as to: --CLENE officials, including the Board of Directors, Advisory Committee, Task Force on Voluntary Recognition System, and State Institute Advisory Committee; --State Library Agencies; --Participants from the New Mexico State Institute, "Planning for Statewide Continuing Education for Library, Information, Media Personnel: 'Statewide Systems of Continuing Education: New Directions Institute'" (Santa Fe, New Mexico, November 1979) --Participants from the ALA Forum (Madison, Wisconsin, December 1979) and -- Participants in the Open Hearing at the ALA Midwinter Meeting (Chicago, Illinois, January 1980). A Fact Sheet summarizing the program and its documents was prepared and distributed to: --Library Schools, including accredited graduate programs, unaccredited graduate programs, Bachelor programs and associate degree programs; --Institutions offering Masters Degrees in Educational Technology; --Major (national-level) associations and organizations; --Networks and vendors; --State Media Supervisors; --State School Media Associations; --State, Regional, or Local Library Associations; and --Participants from the national Conclave on Recognition Systems (Washington, DC, June 1979). (See Appendix G.)

During the course of the project, as the concept of the bi-level national/state councils developed, there were numerous questions from the states as to what state councils would do and how they should be organized. The Project Staff prepared a document titled "Suggested Guidelines for State or Multistate Council Formation: Approval of Programs in Continuing Information, Library, Media Education". (See Appendix H.) It features a suggested procedure for planning a provider approval system at the state or multistate level and details twelve steps and the actions/decisions required to implement them. This document was distributed to all of the state library agencies as part of a package of materials sent out by the CLENE State Institute Project staff under the direction of Eleanor Biscoe and Elizabeth W. Stone. One hundred fifty additional copies were turned over to the CLENE office for further distribution.

Because the Provider Approval System was to be one component of the larger CLENE Voluntary Recognition Service, the Project Director and the Principal Investigator worked with the CLENE Task Force on Recognition Systems in designing and implementing the other components of the VRS, namely the National Continuing Education Registry and the Statement of Acknowledgement for Continuing Education. Dr. Young wrote a summary statement entitled "CLENE Voluntary Recognition Service" for the CLENE State Institute program document. (See Appendix I.) This statement has been reproduced and distributed by CLENE at various meetings and exhibits. Dr. Stone and Dr. Young also prepared the "CLENE Voluntary Recognition Service Information Booklet" (See Appendix J.) which gave detailed instructions for individuals who wished to use the recordkeeping system maintained for CLENE by the American College Testing (ACT) Program National Registry for professional associations.

The Forms

Both application forms and annual report forms were designed during the course of this project. The annual report forms are still in the draft stage because they have not yet been used and tested. The application forms were used, tested, and revised as a result of the pilot surveys. (See Appendix K.) There are at least two philosophical approaches to form design: one calls for brevity and open-endedness; the other, for specificity in the form of lists, prompts, and special layouts and formats. Although certain members of the Council and certain pilot survey participants argued strongly for the first approach, the second one won out for several reasons. Open-ended answers are easier to provide but more difficult to review and judge, i.e., to determine whether all critical points are there and adequately covered. The choice was made in favor of greater ease and efficiency for the Council in its evaluation of the applications. Also, there are many, many details in the Assessment Factors of the Criteria for Quality that are asked about in single questions. If certain points were missed or details omitted, the Council might feel the applicant was deficient, where in fact the answers were simply not sufficiently explanatory. To avoid this as much as possible, more detailed questions and more elaborate instructions were used. It is hoped that this form will reduce the number of applications that must be tabled for further information.

At the end of the project the staff put together a "short" form of the single offering application. It put all of the questions on three sides so the form could be printed on two sheets of paper. The instructions said to copy each question on separate paper and then give the information, taking as much space as was needed. The instructions for this "short" form were longer than for the regular form, because all of the check lists and details were moved to the Guidelines and Instructions. This form is no less structured than the other version. It may, however, be easier to use and less offensive than a fifteen-page form.

The Council determined that the regular organizational and single offering application forms and Guidelines and Instructions were not adequate to elicit the information necessary to review and evaluate individualized self-guided learning programs and offerings. An addendum to the Guidelines and Instructions for both the single offering form and the organizational form was prepared to be used in conjunction with the regular Guidelines designed for use with regular application forms. A copy of the self-guided learning package must be submitted with the application for review.

A contract-like "Terms of Agreement" was prepared for each category of approval. It spells out the rights and responsibilities of the National Council and the approved provider. It also specifies what the approval is granted for. Any additional coverage must be renegotiated with the National Council, perhaps by reapplying for approval. This assures that the provider will not change the scope of his program or offering without the Council being aware of the change and assured of the quality. (See Appendix L.)

Council Procedures

After experiencing the approval process during the pilot surveys, the Council drew up suggested procedures for the National Council to follow. It called for election of officers and outlined the duties of each office. It spelled out the services to be provided by the administrative staff. It suggested a review cycle of four times a year. It suggested three three-person subcommittees to review single offering applications, with these subcommittees acting within one month of the receipt of each application instead of according to the four-times-per-year cycle.

A form was designed for use in evaluating an application (See Appendix M.) It consisted of the Criteria for Quality and each assessment factor printed on a page with a column for rating each and a column for comments. The suggested rating scale was: exemplary, adequate, needs improvement, needs more information, unsatisfactory, and not applicable. For four of the ratings, comments were required. As a link to the Criteria, the relevant question numbers from each application form were also printed.

The Council also drew up sample budgets with various options and levels of income and expenditures. The fee structures for the different categories of approval were drawn up and featured an application fee that was nonrefundable and was due upon the submission of the application, as well as an administration fee that was due upon approval and every year thereafter during the three-year term of approval. These fees were to be set in such a way that the entire Provider Approval System would be self-sustaining as soon as possible.

The various levels of expenditures were contigent on the number of times the National Council would meet in a year, travel and related expenses being the variable.

The Council compiled a model budget in January, but later in the year, at the request of the CLENE Board of Directors, the Council prepared a more detailed budget, with various options spelled out and a preferred option noted and justified. (See Appendix N.)

CHAPTER FOUR
RECOMMENDATIONS

Recommendations were prepared by the Council and the Project Staff and directed to the CLENE Board of Directors. As it was to be one component of the CLENE Voluntary Recognition Service, the Program for Quality in Continuing Education for Information, Library, and Media Personnel was to be accepted and implemented by the CLENE Board of Directors.

The recommendations were presented to the CLENE Board at its meeting during the American Library Association Conference in New York. The recommendations were as follows:

1. The CLENE Board should adopt "A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality, and Provider Approval System" as CLENE policy. (See Appendix F.)

2. The CLENE Board should begin immediate implementation (i.e., July 1, 1980) of the Provider Approval System according to the procedures outlined in the Program document and the implementation guidelines listed below.

3. The CLENE Board should adopt the logo for the total voluntary recognition service as the National Council's official provider logo. (See Figure 5.)

4. The CLENE Board should authorize the Council to accept the providers approved in the pilot phase into the system as officially approved with a waiver of the review fee as stated in the Project proposal.

5. The CLENE Board should assume responsibility for providing Council staff either through assigning responsibility to the present staff or securing additional staff. Estimates of staff time needed and of costs are included in the budget statement. (See Appendix N.)

6. The CLENE Board should develop a concept paper on Learning Consultants. Because the concept of a learning consultant is new and individuals may wish for more guidance in their individualized, independent continuing education learning activities, the concept paper would aid in the development of learning consultants. The content could cover personnel interchange programs, learning consultant interaction, structured self-paced instruction, self-assessment techniques, and "other meritorious learning."

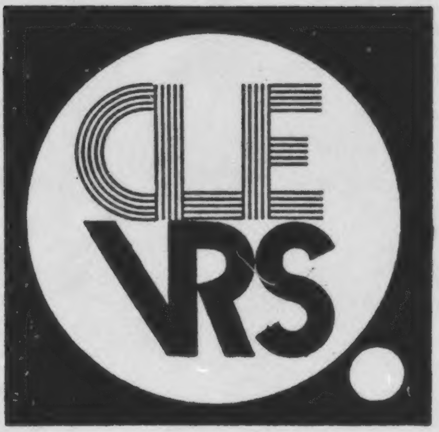

Figure 5. Voluntary Recognition Service Logo

The implementation guidelines covered selection of the new National Council, announcing the new Program to the information, library, media community, and establishing administrative procedures with the CLENE staff.

The Council also submitted to the CLENE Board a statement on the roles and responsibilities of CLENE and the National Council as follows:

- Appointment of Council members
  -- This is the responsibility of the CLENE Board.

- Budget
  The Council seeks to be self-supporting although there may be administrative costs which are not covered by fees collected which will be borne by CLENE, Inc. The fiscal year will correspond to that of CLENE's. The budget for the Council will be separate from that of the CLENE general funds.
  --The Council will submit a budget prior to each year to the CLENE Board.
  --The CLENE Board will approve the allocation of the operating budget.
  --The Council is responsible for expenditure of the funds within the budget.

- Changes and updates to the Provider Approval System
  --The Council is responsible for the Criteria for Quality.
  --The Council will make recommendations to the CLENE Board for changes to the procedures of the Provider Approval System such as the categories of approval.
  --The CLENE Board will provide policy approval of the changes to the Provider Approval System based on the recommendations of the Council.

- Operation of the Council
  --The Council will elect its officers:
    Chairperson -- shall be responsible for coordinating all Council procedures and activities, including the coordination of administrative operations with the staff.
    Secretary--shall provide minutes of Council meetings and conference calls and coordinate correspondence with the staff.
    Treasurer--shall prepare the annual Council budget for review by the Council and approval by the CLENE Board and shall monitor the fiscal record-keeping of the staff.

--The CLENE office is the administrative office of the Council. It will assume responsibility for printing and distribution of information and forms connected with the Program for Quality, coordination with the Council as ex officio non-voting members, and keeping records of income and expenditures.

On June 30, 1980, the CLENE Board of Directors voted

(1) to accept the Program as designed and

(2) to implement the Program as of July 1, 1980.

This represented the achievement of the implicit goal of this project which was to have the "designed, demonstrated" Program in place and operating.

CHAPTER FIVE
EVALUATION

by

Gary R. Purcell

Introduction

The National Council on Quality Continuing Library Education: Information, Library, Media Programs came into being as a result of the funding of a proposal submitted to the U.S. Office of Education by the Graduate Department of Library and Information Science of The Catholic University of America and The Continuing Library Education Network and Exchange (CLENE). The Council and the project which it represented was funded for the period July 1, 1979 - June 30, 1980 under Title II-B of the Higher Education Act, and a no-cost extension of the project was granted to continue the existence of the Council through September 1980.

The project,which was coordinated through the CLENE Recognition Task Force,was embodied in the work of the Council and the project staff for the duration of its existence. The names of the members of the Council and the project staff and their affiliation are listed below.

The Council members are:

- William Asp (Chairman), State Librarian, Office of Public Libraries and Interlibrary Cooperation, Minnesota Department of Education, and Chair of the Chief Officers of State Library Agencies (COSLA)
- Bernard Franckowiak, Dean, the Graduate School of Librarianship, University of Denver
- John Hinkle, Continuing Education Coordinator, Oklahoma Department of Libraries, and Chairperson, Continuing Education Committee, Southwestern Library Association
- John Lorenz, Former Executive Director, Association of Research Libraries
- Margaret Myers, Director, Office for Library Personnel Resources, American Library Association
- Debra Nygaard, Former Director of Continuing Education, American Psychological Association

- Ruth Patrick, Assistant Director of University Libraries, Wayne State University, and Chairperson of the CLENE Recognition Task Force.

Ex-officio members of the Council are:

- Gary Purcell (Evaluator for the project), Professor, Graduate School of Library and Information Science, University of Tennessee

- Alphonse Trezza, Executive Director, NCLIS

Staff members are:

- Elizabeth W. Stone (Project Director)

- Micki Jo Young (Principal Investigator

- Susan Viola (Research Assistant)

- Will Adams (Project Secretary).

Provision for an evaluation of the project was made in the original proposal, where the evaluation was identified as an important aspect of the project. The purpose and procedures to be used in the project evaluation were defined in the proposal on pages 41-42. As a matter of convenience to the reader, these are reproduced below to provide a context for the evaluation which follows.

> "c. External Evaluation by an Outside Evaluator
>
> An External Evaluator will be brought into the planning for the project as soon as the grant award is announced. With the help of the External Evaluator, evaluation procedures will be designed to get input from: 1) project staff; 2) the Council on Continuing Library/Information/Media Education; 3) the providers surveyed in the pilot survey; 4) the participants in the open hearings and meetings where presentations are made. As a part of the final report, the External Evaluator will provide information which will include, along with other data:
>
> 1) The extent to which the objectives of the Project were accomplished;
>
> 2) Identification of factors which either furthered or hampered full realization of objectives;

3) Indication of ways feedback was received from the library/information/media community throughout the project so that necessary adjustments and changes could be made in the tasks of the project;

4) Suggestions, based on processes developed during the project, of the effect clearly defined criteria (and a means of identifying the providers which live up to them) will have on the quality of continuing library/information/media education overall;

5) Evaluation of the results and successes of the project.

At least five areas can be looked at to assess the success of the results of this project:

a. General acceptance by individuals and institutions that the idea of approval of continuing library/information/media education programs is a logical and reasonable approach to attaining quality continuing education curricula for practitioners.

b. General acceptance by the providers of continuing education curricula of the Criteria for Quality which are developed during the Project and the policies and procedures (guidelines) established as a mechanism for identifying those providers which live up to them.

If the providers do not recognize the value of the approval process, or if the policies and procedures established are so rigid as not to permit a necessary degree of flexibility and variety in the design of curriculum, or if the guidelines are too cumbersome or demanding in staff time and resources, providers will not choose to participate in this voluntary program. Experience in other professions (Ruhe, 1971) has shown, however, that there will always be a significant number of providers who do not care whether their programs are approved or not and simply not request a survey.

c. Evidence that the approval program does no harm to providers offering curricula of value to practitioners. The intent is not to penalize any such providers, but rather to assure the practitioner that his/her interests are being protected.

d. General attitude of trust in the Provider Approval System, and the Criteria for Quality on which it is based, by the members of the library/information/media community who are the participants in continuing education activities.

This will be indicated by evidence that persons who are potential participants in a continuing education activity trust and rely on the system's stamp of approval, and evidence that participants seek out approved programs over nonapproved when selecting an activity.

e. Recognition of the value of participation in approved programs on the part of employing agencies as an important factor for consideration at the time of hiring, promotion, and/or review.

The full impact of this Project in these five areas cannot be evaluated within the year's duration of the contract. This can be accomplished only over a period of time. Preliminary review can be undertaken, however, and ongoing activities initiated during this year. The five pilot group projects will be the basis for this preliminary review."

The evaluator for the project used a variety of sources for gathering information used in this report. These several sources are identified and described in the following paragraphs:

1) The evaluator was a participant observer at all of the meetings held by the National Council on Quality Continuing Library Education. These meetings were held on the following dates: June 26, 1979, July 20-23, 1979, October 26-29, 1979, January 23, 1980 and May 2-5, 1980. In addition, the evaluator met separately on several occasions with the Chair of the Council and the project staff to discuss the progress made by the Council at the meetings. The evaluator also participated in all of the conference telephone calls which involved the full Council. The use of the participant observer method in these meetings enabled the

evaluator to observe the process used by the Council from an inside vantage point. This contributed to a greater understanding of the process used by the Council to develop the system which it proposed.

2) The evaluator has examined quite carefully the documents produced by the Council and the staff, both in the draft stages and in the final form. These documents include several parts which are: a) a policy statement about continuing education for information, library, media personnel; b) criteria for quality and assessment factors which can be used to determine the quality; c) description of and guidelines for a provider approval system for the evaluation and approval of continuing education programs; d) guidelines for the formation of state and multi-state continuing education councils, and e) application forms for the approval system. These documents are all included with the report to which this evaluation is appended.

3) The evaluator examined the direct responses of individuals who reacted to drafts of documents disseminated to the field. The first of these drafts was distributed in August, 1979,to a wide, representative group of 475 persons from the information, library and media community. One hundred fifty responses were received which were tabulated and organized by the staff for distribution to the Council and the evaluator. Data derived from this and the second distribution served as an important resource by which the Council was able to respond to feedback from the field. These data were also of value to the evaluator in determining the responsiveness of the Council to the field.

4) The evaluator was an observer at the open hearing held by the Council on January 23, 1980,during the ALA Midwinter Meeting in Chicago. At the hearing, the evaluator was able to gain further insight into the reaction of interested persons to the proposed continuing education provider evaluation and approval system.

5) The evaluator was a participant in one pilot survey visit. In addition, the evaluator met with members of a state continuing education council to obtain their reaction to the role of the state council in the proposed national provider approval system. The information obtained from these two visits as well as the written and oral reports presented by members of the Council who participated in other site visits provided yet another resource for the evaluator to use in determining the responsiveness of the Council to reactions from persons in the field affected by the proposed provider approval system.

6) The evaluator asked members of the Council and the staff to respond to several questions after each of the major meetings of the Council. The questions were designed to elicit responses regarding the progress made by the Council as well as to identify any problems or unresolved issues facing the Council. Responses to these questions were subsequently examined and they formed the basis of two interim evaluation reports.

The information obtained from the various sources described above have been brought to bear in the preparation of the evaluation of the project. The evaluator believes that the procedures used and the data obtained provide a sound basis for the evaluation of the project, from the standpoint of both the process employed by the Council and staff, and the products created by them.

The evaluator has written the evaluation of the project with the assumption that the reader has already examined the project report to which this is attached as well as the documents produced by the Council.

Evaluation

The following is an evaluation of the project identified above. The report of this evaluation is organized by the five broad topics identified in the original proposal and reproduced in the previous section of this report. Each of the five topics is identified below and then is followed by an evaluation which indicates how well the objectives or expectations were met.

Extent To Which The Objectives Were Accomplished

In the proposal, the purpose of the project was identified as "to improve the quality of continuing library/information/media education, especially in terms of curriculum design, by means of CRITERIA FOR QUALITY in order to contribute to the ultimate goal of increasing the effectiveness of library and information services to the public." To provide an operational context for this general statement of purpose, the proposal identified two goals and eight objectives subordinate to the goals. The goals and objectives of the project were found on pages 17-18 of the proposal and are reproduced below for the convenience of the reader.

GOAL I: Formulate Criteria for Quality for Continuing Library/Information/Media Education

The objectives related to Goal I are:

Objective #1: Establish a National Council on Continuing Library/Information/Media Education.

Objective #2: Produce and disseminate a policy statement on continuing education which would include a definition of continuing education and set forth the ideal objectives of continuing education programs for library/information/media personnel.

Objective #3: Develop Criteria For Quality for continuing education programs compatible with the statement on ideal objectives for approved programs and with special emphasis on curriculum design.

Objective #4: Develop a guide setting forth and explaining the objectives and Criteria for Quality of acceptable programs and distribute the guide to all institutions, organizations and individuals known to be concerned.

GOAL II: Develop and demonstrate the feasibility of a nationwide voluntary system for approving programs of providers of continuing education.

The objectives related to Goal II are:

Objective #5: Conduct pilot surveys of at least five providers of continuing education using the previously developed Criteria for Quality as the basis for evaluation and approval of existing programs.

Objective #6: Formalize the policies and specific procedures for evaluating and approving programs and/or courses of continuing education, based on experience gained during the pilot surveys.

Objective #7: Produce, print and disseminate GUIDELINES FOR EVALUATING AND APPROVING PROGRAMS OF PROVIDERS OF CONTINUING LIBRARY/INFORMATION/MEDIA EDUCATION BASED ON CRITERIA FOR QUALITY.

Objective #8: Formulate and announce the manner in which recognition of providers of approved programs and/or curricula will be recognized.

It is the evaluator's opinion that GOAL I and GOAL II as well as each of the eight objectives subordinate to these goals have been met in a highly satisfactory fashion by the Council and the staff. The primary sources of evidence which support this statement are the publications produced by the Council and staff as a result of their efforts during the past year. There are two major publications produced by the Council. The first is entitled The Program For Quality Continuing Education. This consists of two parts: Vol. 1, Policy Statement and Criteria for Quality, and Vol. 2, Provider Approval System. The first volume includes the general statement of policy which serves as the basis for the development of a CE provider approval system. This document also includes the criteria for quality and a detailed list of the assessment factors which are to be used to determine if the criteria have been met. The Council and staff have also published Guidelines for the Formation of State or Multi-state Councils and various application forms for the provider approval system. State and multi-state councils are encouraged as a part of the provider approval system as a means of bringing a part of the approval process to the state or regional level.

Objective #1 was met in part when the National Council was appointed. However, the continued existence of the National Council is basic to the operation of a national provider approval system. Included in the volume titled The Provider Approval System is a mechanism for the continued existence of the Council. In this is defined the role of the Council within a national provider approval system as well as the method of appointment and the operating procedures for the Council. Its relationship with the sponsoring organization is also defined. This document includes all of the necessary information to structure a continuing National Council which would serve as the heart of the provider approval system.

GOAL I and Objectives #2, 3, and 4 are met by the publication of The Policy Statement and Criteria for Quality. This goal and these objectives are inter-related in that they all deal with the development of the criteria for quality and the policy statement on which the criteria are based.

Objectives #6, 7, and 8 are met by two publications, The Provider Approval System and The Formation of State or Multi-state Councils. These three objectives are inter-related because Objectives 6 and 8 indicate the nature of the content which should be included in the guidelines and Objective 7 pertains to the publications and distribution of the guidelines.

Objective #5 was met as a result of the staff and Council's efforts to meet the other objectives. The pilot surveys mentioned in this objective were carried out pursuant to the development of the total provider approval program.

GOAL II was met by virtue of the publication of the items identified above.

The evaluator's judgment that the goals and objectives of the project were met in a highly satisfactory fashion is based on an examination of the documents mentioned above, a comparison of the context of the documents with the recommendations and responses from the field received by the Council and an estimate of the viability of the proposed provider approval program. It is the opinion of the evaluator that the criteria and assessment factors are well conceived and that the provider approval program, if implemented, would be a functioning, successful system.

Factors Which Either Furthered or Hampered Full Realization of The Objectives

Because the project was carried to a successful completion with all of the goals and objectives being fully realized, it should be evident that most of the factors noted in this section will be those which were helpful in the realization of the objectives. The order of presentation will identify these factors first.

The single most important factor leading to the full realization of the objectives was the strong commitment of the Council members and the staff to the success of the program. Members of the Council and of the staff were competent, well prepared and conscientious in completing their assigned tasks. Most members of the Council attended each of the three major work sessions and those who were absent missed the meetings because of unavoidable schedule conflicts. Most of the Council members were also in attendance at the meeting and the open hearing conducted by the Council at the ALA Midwinter meeting in January, 1980. Council members were prepared, as assigned, to present working papers for other members to examine at the work session. During the duration of each of the three work meetings, Council members worked very hard, normally putting in work days which began at 9:00 a.m. and continued until 11:00 or 12:00 p.m. with only normal meal breaks. The productivity of the Council was significant during these meetings. The creativity of the Council was also significant in that the documents which were created in this fashion were written in a logical, coherent fashion.

The work of the staff on this project was also commendable. In the interim between the meetings of the Council, the staff was involved in implementing the decisions of the Council and preparing for distribution of the draft criteria and guidelines to a wide variety of interested persons. The staff also tabulated the data received from the field, scheduled and participated in site visits, and prepared application forms for the provider approval system. During the time of the Council work sessions, staff members were fully involved and in some instances worked through the night in order to have drafts ready for the Council to work with the following day. The diligence and effectiveness of the staff resulted in the Council members' making more effective use of their time in the few days they were able to spend together.

Another important factor in the success of the project was the response received from the interested persons in the field. This information provided the Council and the staff with a means of monitoring the quality and the potential acceptance of the system which they were developing. Many individuals from the field made helpful, constructive, critical suggestions for improvement of the program. During the pilot survey phase, the several institutions or individuals who agreed to participate spent a great deal of time in the preparation of the application forms and then meeting with the site visitors to describe their program and to offer helpful criticism of the criteria and the approval application forms. The input of these individuals was invaluable to the Council and the Council gave serious consideration to the responses from the field.

A related factor in the success of the project was the relative flexibility of the Council as a group. There was a spirit of cooperation among the members of the Council which was manifest throughout the project. This resulted in an atmosphere of honest, forthright discussion and enabled the Council to make adaptations when necessary.

Another factor which contributed materially to the success of the project was the careful advance planning by the staff prior to each of the meetings of the Council. Members of the Council were given specific assignments for each meeting and an agenda was prepared for each meeting which identified all of the tasks to be accomplished by the end of the meeting. Background materials which enabled the members of the Council to prepare for the meetings were distributed in advance and a resource collection for use by the Council was available for each meeting. The advance planning and the availability of the materials enabled the members of the Council to take full advantage of the time they spent together.

There were factors which tended to interfere with the project. The single most important factor which hampered the work of the Council was lack of time. The three major Council work sessions were each scheduled from Friday evening until Monday afternoon. The first of these occurred soon after the ALA annual conference in Dallas. It was necessary to schedule it shortly after the project began, but most members of the Council when surveyed, indicated that they did not have time to prepare properly for the first work session. Members of the Council had met briefly in Dallas to gain familiarity with the project. At that time they were assigned extensive reading and work assignments prior to the first meeting.

The amount of time available at each of the work sessions was limited and as a consequence Council members indicated they did not feel they had time to give careful consideration to the work which they had produced and to reflect on their work to be assured of stylistic and content consistency. The concern expressed by Council members about this was less after the second and the third work sessions, due to the fact that a greater amount of time was available for preparation between meetings. Also, Council members had by that time gained greater familiarity with the project. However, even at the last work session, there was almost universal feeling that an additional day would have been desirable.

Another factor which tended, at the beginning of the project, to interfere with the realization of objectives was a difference in expectations on the part of the staff and the Council. This difference became less evident as the project proceeded and toward the end was not evident at all to the evaluator. However, initially there was a difference between staff and Council members' expectations or understanding of the direction which the project should take. The reasons for this difference were not apparent to the evaluator but probably resulted from different degrees of familiarity with the project and limited experience working together. The discussions which resulted from this enabled the staff and Council members to examine issues more fully and eventually to come to a consensus on most of the decisions which were made. In any case, although some differences in expectations did exist initially, they did not prevent the realization of the objectives.

Indications of Ways in Which Feedback Was Received From The Field

Feedback was sought from the library/information/media field through several mechanisms in order to provide the Council and the staff with an indication of the extent to which the field would accept and utilize the program. These have been mentioned above in another context but will be mentioned again. The first major effort to obtain feedback from the field was in August, 1979. The Council had prepared a first draft of the policy statement, the Criteria for Quality and part of the guidelines for the provider approval program. These documents, prepared at the first work session of the Council, were distributed to four hundred seventy-five individuals. Each recipient was asked to examine these documents and invited to send his/her reactions to the staff. The form in which the document was sent to respondents was designed so that individuals could write comments in response to every sentence in the documents. In addition there was a scale to enable respondents to indicate whether they considered each criteria and each assessment factor necessary, desirable, optional or unnecessary. One hundred fifty persons responded to this request and sent their comments to the staff. The staff prepared an analysis of responses and of suggestions for change and then provided Council members with summaries which included this analysis, as well as copies of the statements of individual respondents. This proved to be a very useful resource which enabled the members of the Council to give full consideration to the comments and suggestions of respondents. Many of the ideas which were received through this mechanism were reflected in changes in the policy statement, in the criteria or in the provider approval system.

The second major effort to elicit a response from the field came as a result of an open hearing which was held during the ALA Midwinter meeting on January 23, 1980. The hearing was announced widely and individuals with an interest in the Criteria for Quality or the provider approval program were encouraged to attend and to offer their suggestions and recommendations. Several people attended and their comments were recorded. A summary of their comments was sent to members of the Council. Some of the persons who attended the hearing only asked questions for clarification. Others added to comments they had made in writing at an earlier time.

The third method used to obtain feedback from the field occurred when a revised version of the first set of documents was distributed. This was sent out in December 1979 after the second Council work session. Fewer individuals responded to this version than when the first set of documents was sent out. In the second mailing the documents which had previously been distributed in three separate parts were combined into one and the content was substantially revised and enlarged from the first time it was sent out. Copies were not distributed as widely as with the first set of documents. Although well conceived and well executed, this activity did not result in substantial feedback from the field.

A fourth means by which feedback from the field was obtained was through the pilot surveys. The pilot surveys were site visits to selected institutions which agreed to submit an application for organizational provider approval, single offering approval, or approval as a learning consultant for individualized learning activities. The pilot survey participants were asked to allow two members of the Council or staff to visit and obtain further information about the continuing education program for which they sought approval. They were also asked to provide the site visitors with feedback about the application process and about the criteria for quality as well as other aspects of the approval program. The site visits were a valuable source of information about the institutions and individuals applying for provider approval. However, when each program's application was considered by the Council, the information obtained during the site visit added a great deal to the information obtained from the application form. The process was even more useful in determining the viability of the provider approval program. As a result of the site visits, the Council made significant alterations in the questions asked of applicants and in the forms which were used.

The evaluator observed a definite responsiveness on the part of the Council to the concerns about the system expressed by the people from the field who responded in one of the methods noted above. There were of course conflicting comments and it was not possible for the Council to meet every expectation. However, there were several ideas for which there was strong support from the field which resulted in the changes in the criteria, the provider approval system or in the application forms. The evaluator believes that the Council and staff demonstrated genuine interest in and responsiveness to the concerns of the field and that the mechanisms by which these concerns could be expressed were readily available to all who were interested in using them.

Suggestions About The Effect Which Clearly Defined Criteria Might Have On The Quality of Continuing Education Programs

During the three work meetings the Council gave considerable attention both directly and indirectly to the effect that the criteria and the provider evaluation and approval process would have on continuing education in the field. The criteria were developed by the Council with a conscious awareness of the potential effect which they would have. From an examination of the criteria and an examination of the comments of respondents, the evaluator has some specific observations regarding the effect which the criteria and in fact the provider approval program as a whole is likely to have on the quality of continuing education programs.

Close adherence by providers of continuing education to the criteria will create a structure frequently found lacking in the planning, development and implementation of continuing education programs. The criteria provide a sound structure which can be used for the planning of individual continuing education offerings or for a program with multiple offerings. The criteria can be used independent of the provider approval program and it is expected that they will be. In fact, this expectation has been the reason for the publication of the policy statement and the criteria as a separate publication. This separate publication is intended to satisfy requests for these documents from people who do not want to follow the full provider approval program but who do want to use the criteria.

The evaluator has another observation about the effects of the criteria and the provider approval program as evidenced by responses from participants in the pilot surveys. Several of the institutions or individuals who participated in the pilot program commented on the fact that the questions which they were required to answer in order to seek provider approval required that they consider factors which they had not previously considered in relation to the structure or planning of their continuing education program. They were required to obtain and maintain data in a systematic fashion which they had not previously collected. Some indicated that they realized the data would be useful to collect on a continuing basis and that the process of completing the application form or the annual renewal form would provide a reason for collecting the data. This was considered by some of the participants in the pilot survey to be a major benefit of the provider approval program. The evaluator believes that this will prove to be of long term benefit to participants in the provider approval program in that they will develop a better system for obtaining and maintaining data about their continuing education activities.

Evaluation of The Success of The Project

It is too early to determine the long term success of the project. The long term success of the project will depend to a great extent on how widely accepted the concept of the provider approval system is by providers and perhaps more importantly, by individuals who are seeking opportunities for continuing education.

There are, however, some short term successes which can be identified. One important short term success is the creation of the criteria for the planning, development and implementation of continuing education programs in the field of library/information/media. No comparable set of criteria exist at present. The criteria can be (and it is expected that they will be) widely used by institutions which currently offer continuing education programs. The criteria are generalizable to any type of institution and provide a coherent, comprehensive structure which if followed carefully is bound to improve the quality of any continuing education program.

As noted in the proposal, (p. 42) there are at least five areas which can be used to assess the success of the project. Within the context of these, additional short term successes will be identified. The evaluator will look at each of these five areas and comment on them in terms of the evidence currently available which can be used to assess the project's success.

a. General acceptance by individuals and institutions that the idea of approval of continuing library/information/media education programs is a logical and reasonable approach to attaining quality continuing education curricula for practitioners.

The data which was received from persons in the field who responded at one point or another in the process of obtaining feedback indicated that there was acceptance of this concept among those who were familiar with the project. An attitude expressed by several people was that the criteria and the provider approval program were long overdue and that the implementation of a program of approval would be highly desirable if it would improve the quality of CE programs. This is a short term indicator of the success of the project. It is not possible prior to general distribution of the program documents to determine how widespread acceptance will be by the individuals and institutions most closely involved with this.

b. General acceptance by the providers of continuing education curricula of the Criteria for Quality which are developed during the project and the policies and procedures (guidelines) established as a mechanism for identifying those providers which live up to them.

There was a high degree of acceptance of the Criteria for Quality by the providers contacted in the pilot survey. Comments made by the providers indicated they generally thought the Criteria and assessment factors were sound. However, some concern was expressed about the mechanism by which adherence to the Criteria was determined. This concern was addressed by the Council during its final work session and several adaptations were made in the provider approval system. Among these were changes in the information requested from the providers and the format in which the information was requested. It is too early yet to determine how widespread acceptance of the Criteria will be by the providers, but preliminary evidence based on the pilot survey indicates that the Criteria are likely to be widely accepted.

There was a question raised by some providers as to the desirability of giving blanket program approval to an institution, thus enabling it to obtain approval for several offerings rather than approving each offering separately. This appeared to represent a sharp difference in philosophy between the Council and some members of the information/library/media community. It is possible that this aspect of the program will not meet with universal approval. There will continue to be some persons within the field who believe each CE offering should be considered and given separate approval. However, the Council has taken the position that adequate quality control can be exercised by monitoring the offerings of institutional providers through an annual report and a triennial application process.

c. Evidence that the approval program does no harm to providers offering curricula of value to practitioners.

The pilot survey of various types of providers indicated that there was no harm done to the providers of the programs which submitted applications for approval. The only area where there was concern was in the amount of time required to respond to the requests for information. Some found the time to be so great as to be prohibitive. Others thought the time required was quite acceptable. In any case, recommendations about this were given serious consideration by the Council. As a result of their recommendations the forms were altered in order to reduce the amount of time required. The requests were limited to what the Council considered to be essential information.

d. General attitude of trust in the provider approval system and the Criteria for Quality on which it is based, by members of the library/information/media community who are the participants in continuing education activities.

At this time there is no way to determine the extent to which registrants for continuing education programs will trust the provider approval system. There is no data derived from the users of continuing education programs to indicate their awareness of the criteria or even of the existence of an approval program. After the program has been implemented and in place for a while, it will be possible to determine the degree of trust which CE participants have. It will depend in large part on their perception of the quality of CE programs which they attend which are identified as approved programs. If they attend approved programs which are not well planned and which do not meet the criteria, they will undoubtedly lose confidence in the provider approval system. The key to developing trust in the system will be the success rate that attendees experience when attending approved CE offerings,and that will have to be assessed after the system is operating.

e. Recognition of the value of participation in approved programs on the part of employing agencies as an important factor for consideration at the time of hiring, promotion and/or review.

It is also too early to determine how widespread this will be. However, there is already evidence to suggest that some employers will give careful consideration to participation in CE programs. For example in Michigan, employment in public libraries is based on certification which, in turn, is based on formal education and the completion of approved continuing education programs which carry Continuing Education Units (CEU's). It is likely that other states will follow this pattern in one way or another as the approval system develops. However, a full evaluation of this will have to be determined after the program is operational.

Conclusion

It is the considered opinion of the evaluator that this project was very successful in meeting its stated goals and objectives. It was also successful in meeting a need which has been clearly articulated in the profession, i.e., the need for a continuing education provider approval pro-ram. The meeting of this need has occurred through completion of the components of this project, namely the development of a set of criteria for quality continuing education, the design of a national continuing education evaluation and approval system, and the creation of a national council to administer the program. These components are each represented by documents which were created by knowledgeable and competent individuals who worked very hard to achieve their objectives. The Council and the staff were also well served by the quality of leadership which they had. Further, they were the beneficiaries of a great deal of useful feedback which they received from the field.

The Criteria for Quality and the provider approval system are now ready for implementation. The Criteria and the assessment factors can be utilized without the provider approval system. However, the approval system can be implemented with the sponsorship of CLENE and is projected by the Council to be a self-supporting program. The long term success of the project will depend on its widespread and early implementation to take advantage of the momentum achieved thus far by the existing Council. The long term success also depends on how widely accepted the Criteria and the provider approval program are by the profession. At this point, the evaluator has every reason to believe that the program will be a success, based on the evidence accumulated to date.

APPENDIX A

CLENE CONTINUING EDUCATION RESOURCE PACKAGE
ON NONTRADITIONAL LEARNING OPPORTUNITIES

CLENE CONTINUING EDUCATION RESOURCE PACKAGE
ON RECOGNITION SYSTEMS FOR CONTINUING EDUCATION

CLENE CONTINUING EDUCATION RESOURCE PACKAGE ON NONTRADITIONAL LEARNING

This CLENE Continuing Education Resource Package consists of the materials listed below. They represent a sampling of selected documents from the CLENE files on Nontraditional Learning. In the Bibliography, these materials are listed alphabetically by author; here, they are grouped under seven main categories. Each document has a distinctive number so it can be located more easily in the Package.

CATEGORY	NUMBER	DOCUMENT TITLE	PAGES	DATE
1. Background	1.1	Nontraditional Learning: Background Statement	10	1978
2. Bibliography	2.1	Annotated Bibliography on Nontraditional Learning		1978
3. Open Learning Movement	3.1	Higher/Wider Education: Report on Open Learning (Gross)	32	1976
	3.2	"Precious Element in the Midst of Chaos" (Gould)	1	1977
	3.3	"Higher Education: For Whom and By Whom" (Gould)	3	1977
	3.4	"Diversity Plus 2" (Valley)	8	1975
	3.5	The British Open University Occasional Newsletter #1	14	1978
	3.6	The British Open University Occasional Newsletter #2	11	1978
	3.7	"The Invisible University" (Gross)	4	1977
	3.8	Publications of CAEL	4	1978
	3.9	CLEP May Be For You	30	1976
	3.10	Open Learning Glossary and Acronymns (Stone)		1978
4. Nature of the Nontraditional Learner	4.0	See Page 5 of Document 1.1 for "Typology of Learners"	1	1976
	4.1	Independent, Self-Directed Learners in American Life: the Other 80% of Learning (Gross, Hebert, and Tough)	42	1978
	4.2	"Self-Planned Learning in America" (Penland)	1	1978
5. Educational Brokering	5.1	Educational and Career Information Services for Adults	48	1978
	5.2	BULLETIN! National Center for Educational Brokering	4	1978
6. State Plans for Nontraditional Learning	6.0	See also CER Package on Recognition Systems: Michigan and South Dakota		1978
	6.1	Recommendations for Lifelong Learning in Iowa in the Third Century (McClure)	42	1977
	6.2	Iowa's Proposal for Statewide Education Information Centers	6	1978
7. Nontraditional Approaches to Learning in Libraries	7.1	Sample Plan for Public Library Services for the Adult Independent Learner (Mavor et.al.)	2	1976
	7.2	Six Examples of Public Libraries and the Adult Independent Learner in New York State in Bookmark	30	1978
	7.3	Nontraditional Education Experiments in New Mexico	1	1978
	7.4	Texas Statewide Video Project	32	1977
	7.5	Alaska Tri-Dimensional Training Program for Adult Leaders	15	1975
	7.6	Guides for Developing Home Study Courses (CLENE)	52	1977
	7.7	CUA Home Study Course on Motivation (Brochure)	8	1978

CLENE CONTINUING EDUCATION RESOURCE PACKAGE ON RECOGNITION SYSTEMS FOR CONTINUING EDUCATION

*** Appendix A ***

This CLENE Continuing Education Resource Package consists of the materials listed below. They represent a sampling of selected documents from the CLENE files on Recognition Systems. In the Bibliography, these materials are listed alphabetically by author; here, they are grouped under six headings. Each document has a distinctive number so it can be located more easily in the Package.

CATEGORY	NUMBER	DOCUMENT TITLE	PAGES	DATE
1. Background	1.1	Recognition Systems for Continuing Education: Background Statement		1978
2. Bibliography	2.1	Bibliography on Recognition Systems for Continuing Education		1978
3. Samples of of Non-Library Systems	3.1.1	Application for Physician's Recognition Award	4	1978
	3.1.2	The Physician's Recognition Award (AMA) Booklet	74	1977
	3.1.3	''Alternative to Mandatory Continuing Education by Clarke W. Mangun, Jr. (AMA)	10	1976
	3.1.4	Physician's Recognition Award (AMA)	1	1978
	3.2.	The Optometric Recognition Award	8	1976
	3.3.1	P.A.C.E. Booklet (ASMT)	8	1978
	3.3.2	P.A.C.E. Application for Enrollment	1	1977
	3.3.3	General Information for P.A.C.E Participants	2	1977
	3.3.4	Application Guidelines and Instructions (P.A.C.E)	5	1977
	3.3.5	P.A.C.E. Questions and Answers	2	1977
	3.3.6	P.A.C.E. Program Approval	6	1977
	3.4	PAR (Civil Engineers)	25	1975
	3.5	AMRA Continuing Education Program	12	1976
	3.6	American Dietetic Association C.E. Guidelines	9	1974
	3.7	Ohio Continuing Professional Development for Engineers--Voluntary Pilot Program	2	1976
	3.8	Florida Engineering Society Certificate of Continued Professional Development	3	1976
	3.9	Professional Engineer's and Land Surveyor's Recognition Award	2	1976
	3.10	Continuing Professional Engineering Development Voluntary Program of Wisconsin Engineers	2	1975
	3.11	ADHA System of Continuing Education	1	1978
4. Samples of Library and Statewide Systems	4.1.1	Michigan Model Recognition System (Library)	10	1978
	4.1.2	Application and Procedures for Ceu's (Michigan)	16	1978
	4.2.1	South Dakota Continuing Education Handbook	25	1978
	4.2.2	South Dakota State Plan for CEU	31	1975
	4.3.	Suggested Illinois Statewide Plan for CEU	16	1975
	4.4	North Dakota Recognition for CE (Nursing)	12	1971
	4.5	CEU Implementation in Indiana (Nursing)	4	1974
	4.6	Proposed Recognition System for Librarianship (Summary)	4	1977
	4.7	Proposed Recognition System for Librarianship	55	1977
	4.8	Guidelines for State Medical Association Accreditation of Programs in Con. Med. Education	6	1971
	4.9	Guidelines for State Voluntary and Mandatory Continuing Education Systems (Nursing)	24	1975
	4.10	Continuing Education Recognition System for Public Library Staff: Wisconsion Association of Public Librarians	3	1978

CLENE CONTINUING EDUCATION RECOURCE PACKAGE ON RECOGNITION SYSTEMS FOR CONTINUING EDUCATION (Page 2)

CATEGORY	NUMBER	DOCUMENT TITLE	PAGES	DATE
5 Provider Approval Programs	5.0	See Pace Approval Program (3.3.5)		
	5.1	Continuing Education Provider Approval Program: American Council on Pharmaceutical Education	18	1976
	5.2	Statement on Standards: CPA	10	1976
	5.3	"Accreditation of Continuing Education Programs for Professionals" by Jeanne Burson (P.A.C.E.)	5	1976
	5.4	American Society for Microbiology: Evaluation of Continuing Education Programs	20	1976
	5.5	AMA Essentials of Approved Programs in Continuing Education	12	1970
	5.6	"American Medical Association's Program of Accreditation in Continuing Medical Education" by C. H. William Ruhe	10	1971
	5.7	Society of Nuclear Medicine: CEU Program Approval (VOICE Program) Technologist Section	8	
	5.8	Conferences on The Continuing Education Approval and Recognition Programs (Nursing)	3	1975
	5.9	Standards for C.E. in Nursing (ANA)	8	1974
	5.10.1	Accreditation Plan of the Council for Noncollegiate Continuing Education	6	1978
	5.10.2	Standards for Accreditation of the Council for Noncollegiate Continuing Education	5	1976
	5.11.	Suggested Criteria for CE Programs (Library)	8	1977
	5.12	Guidelines for Planning CE--Suggested (Library)	20	1977
6. Continuing Education Unit (CEU	6.0	See Also Michigan State System 4.1.1		
	6.1	The Continuing Education Unit: Criteria and Guidelines, National Task Force on CEU	31	1975
	6.2.1	Council on the Continuing Education Unit	10	1978
	6.2.2	Application for Membership Council on CEU(Indiv.)	1	1978
	6.2.3	Application for Organizational Membership CCEU	1	1978
	6.3	"CEU Comes of Age" by John W. Enell	5	1975
	6.4	CEU Checklist for Societies	7	1975
	6.5	Landmark Statement on CEU (ANA)	4	1973
	6.6	CEU Computer System of West Virginia (Hadsell)	7	1975
	6.7	Sample CLENE CEU Certificate	1	1977
	6.8	**Checklist of Groups Awarding CEUs**	3	1975

APPENDIX B

COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION: INFORMATION--LIBRARY--MEDIA PROGRAMS

DALLAS ORIENTATION PACKET MATERIALS

6/21/79

COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION:
Information--Library--Media Programs

Dallas Orientation Packet Materials
Selections from CLENE CE Resource Package on Recognition Systems

FOLDER # 1--Green
AMERICAN MEDICAL ASSOCIATION

Code #	TITLE	PAGES	DATE
3.1.1	Application for Physician's Recognition Award	4	1979
3.1.2	The Physician's Recognition Award: Information Booklet	52	1978
3.1.4	Physician's Recognition Award Form	1	1978
4.8.1	Guidelines for State Medical Association Accreditation of Programs in Continuing Medical Education	6	1971
4.8.2	Continuing Education Fact Sheet	11	1979
5.5.1	Essentials for Accreditation of Institutions and Organizations Offering Continuing Medical Education Programs	12	1978
5.5.2	Guidelines to Essentials for Accreditation of Institutions and Organizations Offering Continuing Medical Education Programs	3	1977
5.5.3	Continuing Medical Education Newsletter, 8(May 1979)	15	1979
5.5.4	JAMA: The Journal of the American Medical Association, 240 (September 8, 1978). [Special Issue: Continuing Education for Physicians]	208	1978
5.6	C. H. William Ruhe, "The American Medical Association's Program of Accreditation in Continuing Medical Education."	10	1971

FOLDER #2--Red
AMERICAN PSYCHOLOGICAL ASSOCIATION

Code #	TITLE	PAGES	DATE
5.13.1	Approval of Sponsors of Continuing Education for Psychologists: Criteria, Standards, and Procedures	11	1979
5.13.2.1	Proposal for a Continuing Education Sponsor Approval System	8	1978
5.13.2.2	The National Registry for Continuing Education: Handbook for Institutions	14	1978
5.13.3	Description of the Continuing Education Sponsor Approval System and Instructions for Applying	2	1979
5.13.4	Application Form for Sponsors of Standard Continuing Education Programs	8	1979
5.13.5	Application Form for Sponsors of Individualized Continuing Education Programs	4	1979

FOLDER #3--Blue
STATEWIDE PROGRAMS

Code #	TITLE	PAGES	DATE
4.1.1	Model Recognition System [for Librarians]: A Proposal For Michigan	10	1978
4.1.2	Application and Procedures for Programs Requesting Continuing Education Units from Michigan Interorganization Committee for Continuing Library Education [MICCLE] in Cooperation with the Michigan Department of Education, State Library Services	10	1978
4.2.1	Continuing Education Handbook, Public Library Extension Services, South Dakota State Library	24	1978
4.2.2	South Dakota State Plan for the Continuing Education Unit	29	1975
4.9	Guidelines for State Voluntary and Mandatory Continuing Education Systems (Nursing)	24	1975
4.10	Wisconsin Continuing Education Recognition System for Public Library Staff	3	1978
6.1	The Continuing Education Unit: Criteria and Guidelines. National Task Force on CEU	31	1975/ 1979

FOLDER #4--Yellow

AMERICAN COUNCIL ON PHARMACEUTICAL EDUCATION

Code #	TITLE	PAGES	DATE
5.1.1	The ACPE Role in Continuing Pharmaceutical Education: Criteria For Quality	8	1978
5.1.2	Continuing Pharmaceutical Education: Approved Providers [Through page 5]	5	1978

AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS

5.2	Statement on Standards for Formal Group and Formal Self-Study Programs	4	1978

COUNCIL FOR NONCOLLEGIATE CONTINUING EDUCATION

5.10.2	Standards for Accreditation	5	1978
5.10.3	Guidelines for Analytic Self-Evaluation	6	1978
5.10.4	Benefits of Accreditation	2	1979

FOLDER #5 -Orange
AMERICAN SOCIETY FOR MEDICAL TECHNOLOGISTS

Code #	TITLE	PAGES	DATE
3.3.2	P.A.C.E. Application for Enrollment	1	1977
3.3.3	General Information for P.A.C.E. Participants	1	1977
3.3.4	Guidelines and Instructions for Programs Requesting CEU's in the P.A.C.E. Program	6	1979
3.3.5	P.A.C.E. Questions and Answers Concerning the Operation of the P.A.C.E. Program	1	1977
3.3.6	P.A.C.E. Program Approval Request (Application)	6	1979
3.3.7	P.A.C.E. Program Approval Request Information (ASMT Memorandum)	1	1979
3.3.8	Questions and Answers About Program Approval Requests	1	1977

APPENDIX C

COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION: INFORMATION--LIBRARY--MEDIA PROGRAMS

ASSIGNMENT SHEETS

Appendix C

THE
CATHOLIC UNIVERSITY
OF AMERICA
WASHINGTON D.C. 20064

GRADUATE DEPARTMENT OF LIBRARY
AND INFORMATION SCIENCE
202 635-5085

Following through on the suggestion made by Gary Purcell at the close of our Council on Quality Continuing Library Education meeting in Dallas on June 26, there is attached a personalized assignment sheet. It is in the areas outlined on that sheet that we wish you to give particular attention in your preparation for the Pasadena meeting.

Perhaps the easiest way to approach this task is the one suggested by Ruth Patrick at our meeting. That is, to start with the material on the subject as outlined in Chapters 6 and 7 from the CLENE Recognition Model and work from there using the documents distributed to you in Dallas (or any others to which you may have access--or your own ideas). The goal is to have each of the Council members come with a piece of the product(s) for which we are responsible in a working draft format for the Council to start refining at Pasadena. These documents are: 1) a policy statement on continuing education and on recognition for providers and users of programs, and 2) criteria for quality continuing education; and hopefully we may also accomplish something on the procedures for carrying out our provider approval system--once it is formulated!

We should also report some reactions in the lively open discussion that was held as part of the CLENE meeting on the recognition system on Tuesday evening, June 26, in Dallas. In summary, those who came to the meeting asked that the Council make sure to include in its deliberations indication of what would constitute "quality" for individual activities and that these should be stated clearly. One example of how this is done is indicated in the American

Medical Association's application form for the physician's recognition award. It is also dealt with to some degree in items 2 through 7 in the CLENE model.

It will greatly facilitate our work if you can bring 12 copies of your draft material. If you have difficulty in getting it copied, we will be glad to duplicate it for you providing we receive the material 2 days in advance of Pasadena. As we mentioned, there are duplicating facilities at the Pasadena location, but we all know that even the best of copying machines do not always work when needed.

Please indicate on the attached sheet at which airport we may pick you up at 5:00 P.M. on Friday, July 20. Or, if you arrive in D.C. much earlier, please be at the main entrance to the Mayflower Hotel on Connecticut Avenue between L and M Streets (this is just one half black from the Farragut Square Metro Stop) at 4:30 P.M. To be sure we understand exactly where we will meet you, please fill out the enclosed form (and keep one of the copies for your reference).

We plan to leave Pasadena no later than 3:00 P.M. on Monday, July 23. Therefore, you should plan to make plane reservations to check in at one of the area airports no earlier than 5:00 P.M.

It was exciting to meet you all in Dallas and we are looking forward to working with you throughout the project year.

Cordially,

Your Project Staff:

Betty Stone

Betty Stone, Project Director

Micki Jo Young

Micki Jo Young, Principal Investigator

Susan Viola

Susan Viola, Research Associate

Will Adams

Will Adams, Project Secretary

Some Postscripts about the Pasadena Retreat Center:

1. No alcoholic beverages are sold at the Pasadena Conference Center, but groups can bring in anything they wish. We will bring some wine, but if you have a favorite beverage you would enjoy, please bring a supply for yourself (set-ups will be available.)

2. If you prefer to rent a car and drive yourself to the Pasadena facility, let us know and we will send you a map--as soon as we get one.

3. So you will know as much about the Pasadena facility as we, we enclose a sheet in response to the questions posed thus far.

COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION:
Information--Library--Media Programs

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COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION: Information--Library--Media Programs

The Council's Responsibilities and Final Products

THE CHARGE TO THE COUNCIL

1) The formulation of Criteria for Quality to use as a guide in evaluating continuing education programs.
2) The development of assessment factors that a provider would be able to use in appraising its own condition and planning for its future, covering as a minimum the following areas: preparation of an explicit statement of the provider's purposes, goals, and objectives; plan for selecting and counseling students; curriculum design which gives reality to the purpose and converts objectives into attainment; instructional techniques; competency of staff; process of evaluation; financial management.
3) Development of guidelines that the Council can use for determining "approved" programs and/or curricula.
4) Providing a way to recognize providers of approved programs and/or curricula.

THE PRODUCTS

PRODUCT #1--------------------------Draft at Close of Meeting #1
Circulate for Comments
Review at Meeting #2

> Produce and disseminate a policy statement on continuing education which would include a definition of continuing education and set forth the ideal objectives of continuing education programs for library/information/media personnel.

The first product of the Council will be a short policy statement on definition and objectives of continuing library/information/media education. This statement would include topics, such as:

1) Definition of continuing library/information/media education.
2) Ultimate aim of continuing library/information/media education in relation to the needs of the public.
3) Relation of continuing education programs to adequate initial education.
4) The type of objectives each continuing education program should have from the earliest stages of planning which would include such categories as:

--Changes in the attitude and approach of the learner to the solution of problems;
--Correction of outdated knowledge;
--Explication of new knowledge in specific areas;
--Introduction to and or mastery of specific skills and competencies;
--Changes in the habits of the learner.

Such a policy statement on definition and objectives is important for two reasons:

1) To ensure that Criteria for Quality for continuing education programs developed will be compatible with the overall objectives of continuing library/information/media education;
2) To alert providers of continuing education to the importance of formulating specific objectives to use as an important guide throughout the planning and execution of each continuing education program.

The value of the policy statement will be enhanced by submission to all concerned groups of a draft, for comment and subsequent revision before the final draft is produced and circulated widely to the library/information/media community.

PRODUCT #2----------------------------Draft at Close of Meeting #1
Circulate for Comments
Review at Meeting #2

Develop CRITERIA FOR QUALITY for continuing education programs compatible with the statement on ideal objectives for approved programs and with special emphasis on curriculum design.

A document delineating Criteria for Quality for continuing education programs will be the top priority agenda item for the Council. Use of this document will make it necessary for continuing education providers to show evidence of adherence, or capacity to adhere to criteria indicative of the ability to provide quality continuing education activities for library/information/media personnel, if they wish to participate in the voluntary approval program.

Depending upon the procedures worked out for approval of continuing education programs, there is potential for the need for criteria for at least two types of continuing education:

1) Elements to be considered for total programs of an organization or institution would include such categories as:

    - --Administration and organization.
    - --Curriculum design.
    - --Teaching staff.
    - --Budget and resources.
    - --Methods of delivery.
    - --Facilities.
    - --Evaluation (continuing).
        - Participant evaluation
        - Provider self-evaluation

2) Elements to be considered for individual course offerings. (This would include packaged programs, home study courses, and other modes for the nontraditional or geographically isolated learner)

After the Council has developed the tentative statement of criteria for approved programs, it would be exposed to a wide representation of the profession for comments. Then the Council would consider the suggestions received, revise the criteria based on comments received and expose them to the same groups receiving the tentative statement. After considering comments on this exposure, the Council would draft a final statement for widespread dissemination.

> Develop a guide setting forth and explaining the objectives and Criteria for Quality of acceptable programs and distribute the guide to all institutions, organizations and individuals known to be concerned.

Thus a major product of the Project (Council and Project Staff) will be a printed statement (perhaps in the form of a brochure) which would include the final products listed above--definition, objectives, and Criteria for Quality for acceptable continuing education programs. This document would be distributed to all known potential providers, including, but not limited to:

- --Library education programs (all levels)
- --State, regional, and national library/information/media associations
- --State Library Agencies
- --Private firms producing continuing library/information/media education materials.

This document would serve the purpose of helping providers interested in establishing their own programs and/or courses according to recommended essentials of continuing education programs.

This guide would also state that the Council and Project Staff were working on a "Voluntary Continuing Education Approval Program for Providers of Continuing Library/Information/Media Education," and state that as soon as the policies and procedures of this voluntary program had been developed and tested, they would be published and distributed. It would also contain a statement on the purpose and benefits of having a Voluntary Continuing Education Provider Approval Program.

PRODUCT #3----------------------------Basic Discussion at Meeting #1
Draft at Close of Meeting #2
Circulate for Comments
Review at Meeting #3

Produce, print, and disseminate GUIDELINES FOR EVALUATING AND APPROVING PROGRAMS OF PROVIDERS OF CONTINUING LIBRARY/INFORMATION/MEDIA EDUCATION BASED ON CRITERIA FOR QUALITY.

In order to achieve Product #3 and to demonstrate the feasibility of a nationwide voluntary system for approving programs of providers of continuing education, the following objectives and tasks will be carried out:

> Conduct pilot surveys of at least five providers of continuing education using the previously developed Criteria for Quality as the basis for evaluation and approval of existing programs.

In order to facilitate and give validity to the beginning of formal approval procedures, pilot surveys will be conducted to work out specific mechanisms for obtaining pertinent information. The pilot surveys will be made by the Project Staff and appropriate consultants from the Council so that formal mechanisms for carrying out appraisal procedures can be developed.

In determining the choice of pattern for surveys to determine approval of programs, there are two basic patterns which might be followed according to procedures currently being used in other continuing professional education approval programs. (Ruhe, 1971; ACPE, 1976; Burson, 1976; AICPA, 1976).

1) The use of site surveys either by a team of volunteers (as is done for graduate library education programs by the Committee on Accreditation of the American Library Association) or site surveying by employed staff representatives.

2) The requirement that the provider applying for approval submit written data documenting its ability to comply with the Criteria for Quality Continuing Education Programs. The Council would evaluate this data and determine if the program or activity should be approved.

A decision would have to be made by the Council on what method, or combination of methods, would be used in the pilot surveys.

> Formalize the policies and specific procedures for evaluating, and approving programs, and/or courses of continuing education, based on experience gained during the pilot surveys.

Based on the results obtained from the pilot surveys and following the outline presented in the Guide previously developed, specific procedures for approval surveys will be formalized to make sure surveys obtain all of the information necessary for preparing a comprehensive report to present to the Council for review.

> Produce, print, and disseminate GUIDELINES FOR EVALUATING AND APPROVING PROGRAMS OF PROVIDERS OF CONTINUING LIBRARY/INFORMATION/MEDIA EDUCATION BASED ON CRITERIA FOR QUALITY.

In developing and producing this printed statement of the approval mechanism for continuing education programs the document will undergo several drafts and intense scrutiny by the profession by such means as: wide distribution of the document, open hearings for purposes of receiving comments, and careful consideration by the Council of all comments gathered. Such a deliberate and studied developmental process will assure input from all interested parties. It is understood, however, that criteria are evolutionary in nature and that procedures and criteria do not necessarily possess enduring value, and continual development is assumed. It should also be emphasized that this approval program is entirely voluntary in nature; that is, only if an organization requests survey and review of it's program will the approval mechanism be carried out. Those providers which do not care whether their programs are approved or not will simply not request survey; there will undoubtedly be a significant number of providers who will not be interested.

> Formulate and announce the manner in whcih recognition of providers of approved programs and/or curricula will be recognized.

It is estimated that it would take about three to five years before all providers interested in having their programs surveyed could be approved. After all providers interested in voluntary approval had had a chance for review, the decision might be reached that only those courses and programs meeting the criteria of acceptable programs would be listed in the Directory instead of the present unselective listing. Such a decision might ultimately constitute a strong motivation to providers. If practitioners are informed that courses offered by approved providers are listed for their benefit, it is l9kely that they would, in time, enroll chiefly in such courses. This would in turn result in the gradual disappearance of course offerings.

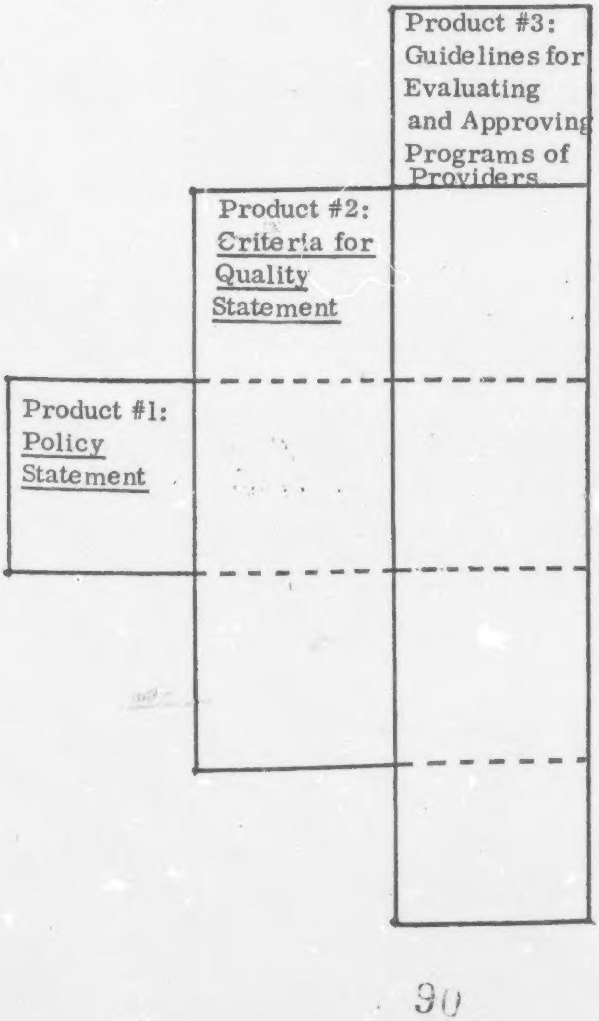
COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION:
Information--Library--Media Programs

GENERAL COMMENTS AND INSTRUCTIONS RELATIVE TO MEETING #1 AT THE PASADENA

Relationships

Perhaps the following diagram helps to conceptualize the relationship between the three products:

1) Policy Statement
2) Criteria for Quality Statement
3) Guidelines for Evaluating and Approving Information/Library/ Media Programs of Providers Based on Criteria for Quality.


Product #3: Guidelines for Evaluating and Approving Programs of Providers
Product #2: Criteria for Quality Statement
Product #1: Policy Statement

Suggested Procedure in Preparation for Meeting #1

1. Start with the Model [Chapters 6 and 7 from Recognition Research Report--which was given to you with the Proposal]

2. Review other resource material

3. Synthesize into a position

4. Prepare draft sections of product(s) for which you are responsible

5. Come to The Pasadena prepared to lead the discussion of the section(s) for which you are specifically responsible. [Probably Saturday Morning]

Considerations to Keep in Mind as You Prepare Your Draft

The Format of the Criteria for Quality

The manner in which Criteria for Quality are presented differs as demonstrated in the sample materials presented to you in your resource package.

For example, the following are three different formats and there are probably quite a few more.

--Criterion stated, followed by
Assessment Factors:
1. .... [stated as questions]
2. ....
[for example, see Exhibit 1, Chapter 6 of Model, page 6-45]

--Criterion stated, followed by
Commentary (usually four or five sentences of explanation)
[For example, see Document 5.2 in Yellow folder--American Institute of Certified Public Accountants]

--Criterion stated, followed by
List of factors that should obtain [for example, see Exhibit 5.1.1--American Council on Pharmaceutical Education, pp. 2-3]

--Statement of criterion, followed by three or four paragraphs, including ways to meet criterion [for example, see Exhibit 3.3.2...--, page 2.--American Society for Medical Technology]

The Question to keep in your mind while examining the materials: Which format do you prefer and why? Come prepared to discuss.

2. Registry of Continuing Education Activities/Programs

At the June 1978 meeting of the Recognition Task Force, the recommendation was made to the Board of Directors of CLENE that a registry of CE activities/programs be implemented in conjunction with the Continuing Education Provider Approval System. By means of this registry system, the providers and CLENE will have records of CE activities sponsored, participant data, and very importantly, evaluations of all CE activities. Participants will receive, upon request and payment of a fee, a transcript of all activities entered in their individual files. The registry will be implemented with an organization outside CLENE, American College Testing (ACT) Program, which has developed an operative CE registry system designed to record CE data for associations and institutions. Using the ACT registry, CLENE would pay no start-up costs and would pay fees on a per use basis. The ACT registry is described in the supplement pages to Document 5.13.2.1 in the materials passed out to you in your packet.

This decision was made following interviews with the Director of the ACT registry by members of the CLENE Recognition Task Force, study and distribution of the ACT forms and materials, and after flexibility of the system had been determined to meet the specific wishes of the Recognition Task Force and CLENE Board. Answers to specific questions asked by the Task Force of the ACT Registry Director are included as Attachment A in this packet of materials.

In addition to making this general decision the Task Force and Board of CLENE made the following decisions:

1. As soon as the ACT Contract is signed by the CLENE President, the system will be gradually implemented on a pilot basis in conjunction with the Quality Continuing Library Education Project.

2. A designated group of individuals and groups will be invited to constitute the pilot group as specified by the Task Force and CLENE Board.

3. The wish of the CLENE Task Force and Board is that a wide range of CE activities/programs may be entered into the system by individuals. The ones which are provided by sponsors meeting the Criteria for Quality as worked out by the present project will be clearly identified in the transcripts sent to the individual participants.

Thus, although record-keeping is an objective of a provider approval system, since the CLENE Task Force and Board have made this decision about the Registry, your thinking about record-keeping should fit in with that provided by the Registry.

3. And now for the individual assignments.
Please see the following sheets.

GENERAL COMMENTS AND INSTRUCTIONS RELATIVE TO MEETING #1 AT THE PASADENA

Assignments for Meeting #1

Assignment Number	Council Member	Related to Product(s)#	Assignment
1	M. Myers	1	Definition of CE as a concept Specific meaning of terms/glossary Scope of content, or range of activities included Eligibility
2	R. Patrick	1	Need for CE Goals and Objectives Why recognition for practioners in CE Rationale: Why an approval system for providers of CE?
3	J. Hinkle	2	Individual, independent self-learning activities. Scope: Due to the emphasis at the public Task Force meeting in Dallas on independent self-learning activities, as typified by categories 3 through 7 in the CLENE model, we are asking you to cover the following areas: objectives, needs of target audiences, methods of learning, credit/time/measurement. Suggest you check over the AMA categories in this area also.
		3	Draft document for 2, but continue thinking in the area of Product #3
4	B. Franckowiak	2	Criteria for Quality for providers of CE programs/activities. Scope note: this has been broadened to include criteria for individualized CE programs. Note the two different forms for these types in APA documents 5.13.4 and 5.13.5. Type of topics to be covered: objectives, target audiences, credit/time/measurement, methods of learning, program planning, evaluation, consideration of and provision for student needs.
		3	Draft document for 2, but continue thinking in the area of Product #3

Assignments for Meeting #1 (Continued)

Assignment Number	Council Member	Related to Product(s)#	Assignment
5	A. Kent	2	Criteria for Quality for providers of CE programs/activities--organization and administration. Scope note: this to include criteria for individualized CE Programs (such as those sponsored by professional associations, state agencies, state associations) as well as for planned standard CE programs (such as those by academic institutions). Components to include: administration, budget, facilities, faculty/instructors, educational content development, delivery systems (ethical marketing), instructional methodology, evaluation. Draft document for #2, but continue thinking in the area of Product #3.
6	Debra Nygaard	3	Guidelines and their implementation Scope note: this will emphasize the responsibilities of the Council in applying the criteria in approving the individualized activities, providers of standard continuing education programs, as well as the independent self-learning activities.
7	B. Asp	 1 1 1 & 2 2 3	Issues: Mandatory vs. voluntary CE Include study toward degrees? Programs vs. individualized activities How measure, including use of CEU Articulation with state programs, as Michigan, South Dakota, Wisconsin, etc.? [See, for example, Chapter 7 of the CLENE Model; and Document 4.9--American Nurses Association; and 4.8.1--AMA]

Information on the National Registry for CE Activities as Reported by Associations

In my meeting with Dr. Michael W. Ham, Director, Continuing Education Services, American College Testing Program, and Director of the National Registry Service, a continuing education record keeping service for professional associations, I raised the questions that had been posed by the Recognition Task Force and by the CLENE Board of Directors. Perhaps the best way to report on this meeting is to give the responses to the questions posed.

2.3.1 How can learning activities be recorded which are not courses, institutes, seminars or workshops?

In the literature for the National Registry the term "course" has been used as a term to encompass all types of learning activities. However, in the new forms now being published the phrase course/learning activity will be used so as not to confuse people. In recording data in the system CLENE could develop its own code number for activities, such as:

1=Classroom Instruction
2=Papers, Publications, Books
3=Correspondence Course
4=Approved Independent Study
5=Practicum/Internship
6=Multi-media/TV/Radio
7=Workshop/Institute/Seminar
8=Study/Discussion group
9=Information-Library-Media Teaching
0=Other

Under the "other" category, it is my understanding that a further code might be developed, such as:

0.1 Association Activity
0.2 Consultation
0.3 Self-assessment Examinations
0.4 Independent Reading Program
0.5 Work Experience

2.3.2 How can CE activities be recorded for which no academic credit or CEU's are given?

There is provision for "Measure" of a course. The measure can be in CEU's, Academic Credit, Hours, or any other designation. Some organizations transpose learning activities not giving academic credit or CEU's into IEU (Individual Educational Units) and this can be used. If it would be decided to give type of recognition award for a certain amount of hours in various categories, the individual's transcript could be used as proof that the designated number of hours had been accumulated within a certain time period.

For those learning experiences which were not offered by an approved sponsor, an individual could submit a description, which if specified criteria were met, could be entered into the system by CLENE.

2.3.3 Is it feasible to have pilot groups on which to test the use of the system before it is open to everyone ?

The Registry does not make a recommendation about whether it is best to start with a pilot group--associations have tried it both ways, that is with a pilot group or opening it up generally.

He did suggest that a way to get the system in place and the difficulties worked out of using it either with a pilot group or opening it up generally would be to experiment initially with recording the 4 CEU's that CLENE is giving to the participants in the 1978/1979 CLENE/USOE statewide Institute. That way the system would be in place and however we might wish to open it up in conjunction with the Quality Continuing Education Project, the system would be established and we would be able to answer questions from actual experience.

A copy of the sample agreement between the ACT National Registry and CLENE was provided and a copy has been sent to Jim Nelson and Ruth Patrick for examination. This agreement would have to be signed before any entries could be made into the system. A sample agreement is provided in Appendix B.

2.3.4 If the sponsor sends in the list of those who participate in a learning activity, is it possible for individuals to elect not to have their names included ?

Each student who wishes to have information entered in the Registry needs to fill out a Student Data Form. If a student does not authorize submission of his/her name and other information about particpation in the course to ACT, that student will not fill out a form and no record will be made in the system. A sample student data form is included as Appendix C. Note that there is an evaluative section to this form. This information about each activity is summarized and sent back as a part of the periodic reporting of various types of data in the system.

2.3.5 Is it possible to enter activities which have been completed in the past ?

Yes, if the association wishes. It is merely a matter of filling out the necessary forms according to instructions for past activities.

2.3.6 What kind of reports would CLENE receive from the Registry each year?

2.3.6.1 A Student Roster which would give a list of all those who had completed continuing education activities during the year. CLENE would specify on what date its own "report year" would end. Information included would be: name, address, identification number, and birthdate for each member who completed a course during the year. The Sponsor code, course number and title, and completion date are listed for the courses each member has completed during the year.

2.3.6.2 The Registry Report consists of 11 tables:

Tables 1 and 2. The members on file, and the members active during the past year, counted in matrix form. Numbers are shown by sex within race within age, with cross totals.

Table 3. The number of course completions and transcript requests during the report year: by sex, race, and age, with percentages.

Table 4. The total percentage distribution of all responses to the course evaluation items (on the Student Data Form) for courses during the report year.

Table 5. The average transcript length during the report year in terms of the mean number of courses per transcript.

Table 6. The number of course completions during the report year by month, with percentage distributions.

Table 7. The number of course completions, transcript requests, and members on file, with percentages, by state.

Tables 8 and 9. The number of courses and the number of course completions during the report year by type of course and type of Sponsor.

Table 10. The number of course completions during the year and courses on file, by Sponsor.

Table 11. The number of course completions during the report year for each bimonthly period for each subject, and the number of courses on file by subject.

Table 12. A list of the courses for which more than 50% of the students during the preceding year gave unsatisfactory ratings on any of the course evaluation items. (An Association can specify a different cutoff percentage if it wishes.)

TIME CHART

JULY	COUNCIL MEETS --Drafts of Policy Statement and Criteria for Quality prepared
AUGUST	--Drafts are circulated to the profession for comments
SEPTEMBER	
OCTOBER	COUNCIL MEETS --Drafts are reviewed --Plans for pilot surveys are made --Draft of guidelines is prepared
NOVEMBER	PILOT SURVEYS BEGIN
DECEMBER	
JANUARY	
FEBRUARY	
MARCH	
APRIL	COUNCIL MEETS --Pilot surveys are reviewed and evaluated --Drafts are reviewed and adjusted --Final recommendations are made
MAY	FINAL REPORT --Submitted to CLENE Board for review
JUNE	FINAL REPORT --Prepared for Office of Education

APPENDIX D

FACT SHEET FOR PILOT SURVEY OF PROVIDER APPROVAL SYSTEM

OUTLINE FOR PROCEDURE FOR SITE VISITS OF CONTINUING EDUCATION PROVIDERS IN PILOT SURVEY

Draft #4

Appendix D

FACT SHEET FOR PILOT SURVEY OF PROVIDER APPROVAL SYSTEM

PROGRAM FOR THE APPROVAL AND RECOGNITION OF
PROVIDERS OF CONTINUING EDUCATION
FOR INFORMATION, LIBRARY, AND MEDIA PERSONNEL
BY
THE COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION (hereafter referred to in this document as National Council)

What are the purposes of approval of continuing education?

The Continuing Education Voluntary Provider Approval System provides national criteria for information, library, media continuing education and identifies providers of quality continuing education programs. The system is offered as a service to individual practitioners, continuing education providers, and the general public. Specifically the purposes of voluntary approval of continuing education are to:

- advance the quality of continuing education, thereby advancing the quality of information, library, media service to the public;
- establish the criteria and characteristics of approved continuing education experiences;
- provide practitioners with a dependable basis for identification of quality continuing education providers;
- provide a basis for uniform acceptance and transferability of continuing education credits from one locality to another;
- provide feedback of information to providers about their offerings, and encourage periodic self-evaluation, with a view to continual improvement and strengtheing of their continuing education activities;
- provide national recognition to approved providers.

On what basis is approval determined?

The Provider Approval System is a voluntary review process for providers offering continuing education activities for information, library, and media personnel. Under the system the provider is evaluated in terms of its capability to provide quality continuing education and its accountability in doing so. The basic guidelines and procedures for review and approval of providers are set forth in the document entitled A PROGRAM FOR QUALITY IN CONTINUING EDUCATION FOR INFORMATION, LIBRARY, AND MEDIA PERSONNEL: POLICY STATEMENT, CRITERIA FOR QUALITY, AND PROVIDER APPROVAL SYSTEM.

This document has undergone a number of drafts and intense scrutiny by means of wide distribution, open hearings for receiving comments, and careful consideration of all comments thus gathered. This deliberate and studied developmental process has assured input from all interested parties. It is understood, however, that criteria and guidelines are evolutionary in nature and the continuing development of this document is assumed.

Who wrote the Program and who does the approving?

The Program for Quality in Continuing Education for Information, Library, Media, Personnel was established at the initiative of the Continuing Library Education Nework and Exchange (CLENE), July 1979, under funding from Title II-B of the Higher Education Act through the Library and Learning Resources Office of USOE. The National Council on Quality Continuing Library Education is an autonomous entity operating under the auspices of CLENE. The National Council is currently composed of seven members appointed by the CLENE Board who represent the information, library, media community. In appointing the members, every attempt was made to select individuals who are expert in continuing education program planning, administration, and evaluation. The National Council formulated the Program for Quality by the process stated above and reviews providers for approval for the pilot surve

What kinds of providers are approved?

Three kinds of continuing education providers are approved:

- Organizations as providers of entire programs, i.e. those who offer numerous continuing education activities, such as formal courses, workshops, institutes, seminars, short courses, home study courses, independent study, mediated learning modules, electronically delivered modules, etc.
- A single offering as a provider. Single offering approval may be requested by information, library, media institutions and organizations such as education programs, state agencies, associations, proprietary organizations, and individuals. Single offering approval may be given for many of the same formats utilized by providers seeking approval as sponsoring organizations.
- Learning Consultants as being responsible for applying the Criteria for Quality for each individual's activity or learning experience. The Learning Consultant accepts the role of being accountable for the quality of each individual's activity. (See pages 40-43 of the Program Document).

Separate application forms are to be completed for the 3 categories of providers. To apply for more than one category of sponsorship, an application form must be submitted for each category.

Are all activities approved by the National Council?

State or multistate councils will be integral components of the coordinated national voluntary provider approval system. (See pages 25-27 of the Program Document). The National Council will delegate to state or multistate councils review and will approve of continuing education organizations and single continuing education activities offered to local or intrastate audiences. The state or multistate councils also approve the qualifications of Learning Consultants for individualized continuing education programs. In the case where state or multistate councils have not been established, the National Council will assume responsibility for reviewing and approving continuing education offered in those areas.

What are the steps in attaining approval?

Providers desiring approval status are expected to take the initiative in going through a series of steps as outlined below. Providers seeking approval assume the burden of proof in presenting themselves as meeting established criteria.

Step 1: The provider will obtain from the office of the National Council a complete set of documents listed below and study them.

- A PROGRAM FOR QUALITY IN CONTINUING EDUCATION FOR INFORMATION, LIBRARY, AND MEDIA PERSONNEL: POLICY STATEMENT, CRITERIA FOR QUALITY, AND PROVIDER APPROVAL SYSTEM
- Application for Approval Forms
- Guidelines for Applications
- Annual Report Form
- Notification of Activity Form
- Description of the National Registry Service of the American College Testing (ACT) Program
- National Registry Forms

Step 2: Ask questions of the Office of The Council on Quality Continuing Library Education, O'Boyle Hall-G-4, 620 Michigan Avenue, N.E., Washington, D.C., 20064 (telephone: 202--635-5876), on any matters that are not clear in the documents provided or which may be useful in filling out the application form, in developing further understanding of the approval process and procedures, in clarifying the kinds of data that should be assembled, etc.

Step 3: Fill out the Application Form for Approval after careful review and self-evaluation of the continuing education efforts for which approval is sought. This review should reveal the philosophy, organization, specific practices and procedures, the success of different components, and the degree to which the provider is accomplishing its stated objectives. The data should not be amassed routinely but in a constant search for new meanings, new methods and procedures, new hypotheses, and new ideas. All those involved in the provider's continuing education efforts should be involved in the application process.

Step 4: Submit two typed copies of the Application Form & supporting data to the National Council on Quality Continuing Library Education. This report is confidential and will be restricted to the use of the National Council and its staff

What is expected of a participant in the pilot survey?

The providers chosen by the National Council will go through the approval process that has been designed, step by step. The National Council will review the provider's application and either award approval or deny approval.

Then, after the process has been completed, the National Council, either through an on-site visit or by a telephone conference, will ask the pilot providers to critique the approval process and the documents used as a part of that mechanism. The suggestions received for the improvement of the system will be reviewed by the Council and agreed upon changes will be adopted into the approval process.

What are the advantages in participating in the pilot survey?

When the "pilot survey phase" of the project is over, there will be an application and review fee to go through the approval process. This fee will be waived for those providers approved during the pilot survey. Approval status lasts for three years, but approved providers will be charged an annual sustaining fee to cover the cost of monitoring and announcing the provider's continuing education offerings, and other administrative functions as required. Those in the pilot survey will not be charged a first year fee.

These providers approved in the pilot survey will be the first to have their activities announced as approved in the regularly published calendar of continuing education offerings, CLENE's Continuing Education Communicator and in the Annual Directory of Continuing Education Opportunities, PUBLISHED BY CLENE The Council will also publish a list of approved providers.

Also, pilot participants will have the opportunity to make suggestions for the content of the system and its implementation.

What steps does the Council go through on receipt of the application form in the pilot Study?

The review process is carried out by the National Council and its staff. Briefly, the review procedure is that depicted on page 5 of this Fact Sheet.

1. Provider approval requests are logged in on receipt.
2. Copies of the application forms and attachments are sent to all National Council members.
3. The Council members rate each assessment factor for each criterion, and the criterion as a whole.
4. Each Council Member votes whether, as a whole, to approve or not to approve the program..
5. The provider approval process will result in one of three decisions:

    - APPROVED STATUS--Approval status is awarded to those providers meeting the criteria. Full approval is granted for a period of three years, but is subject to reassessment under the following conditions:

        1. The provider does not follow terms of Council approval as described in the next section.
        2. The provider's goals, activities, or administration change substantially.
        3. The provider's continuing education activities fall substantially below the defined Criteria for Quality.
        4. The planning, evaluation, and other procedures followed by the provider are substnatially inconsistent with those described in the provider's application.

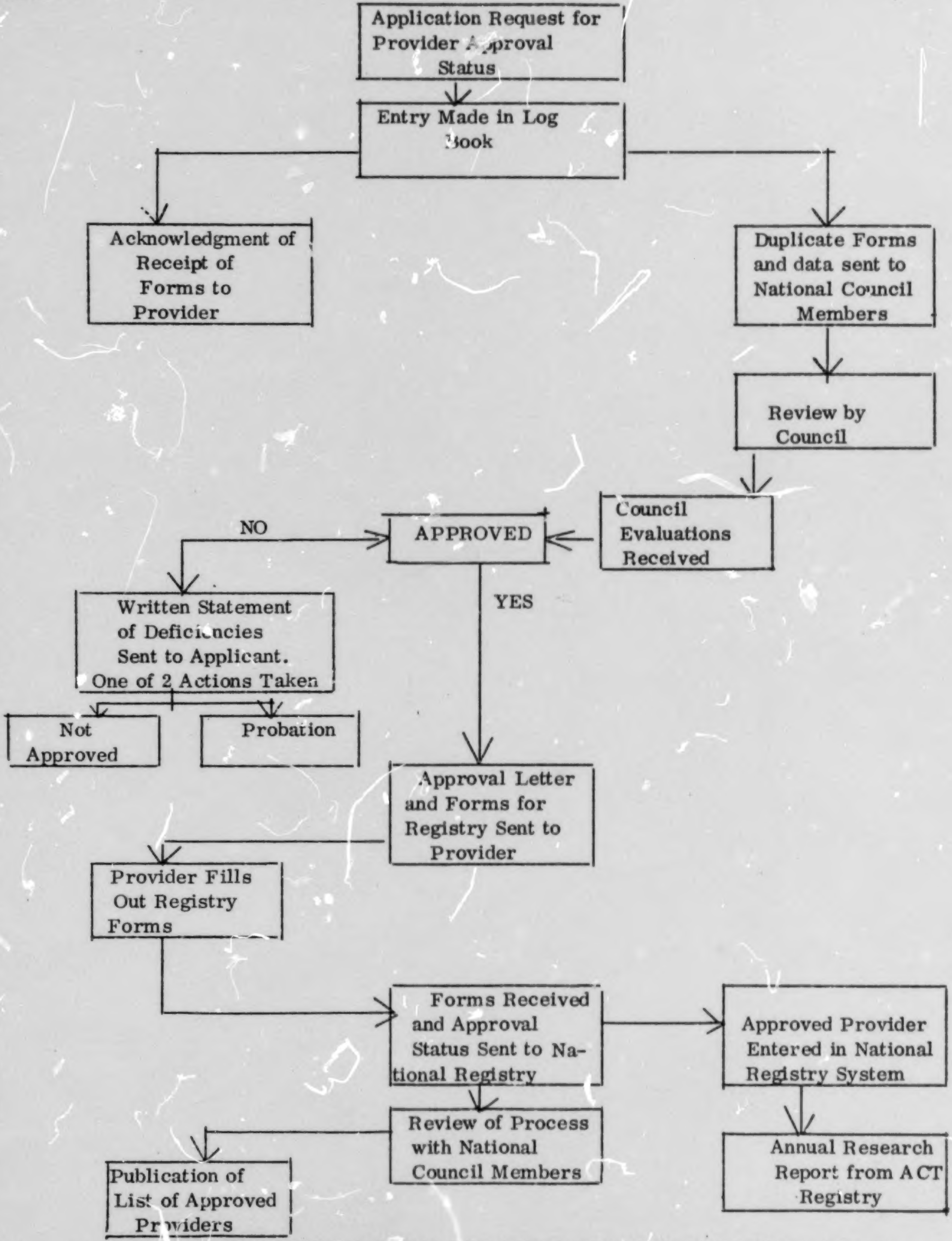
        Under any of these conditions, the provider will be re-evaluated and a determination made as to continuation of approval status.

    - PROBATION--An approved provider may be placed on probation for a period of not more than 9 months if reassessed and judged to fall short of the Criteria for Quality. Upon reapplication and payment of a fee, sponsors on probation may be reassessed for full approval. A written statement of deficiences will be provided the applicant.

    - DENIAL OF APPROVAL STATUS--Approval is denied to those providers who have not provided adequate evidence of meeting the Criteria for Quality. Providers who are denied approval may appeal the decision as outlined in the provider approval system.

6. The National Council will publish a list of all approved providers, single offerings, and Learning Consultants at the end of the pilot study.

Draft #4


Application Request for Provider Approval Status
Entry Made in Log Book
Acknowledgment of Receipt of Forms to Provider
Duplicate Forms and data sent to National Council Members
Review by Council
Council Evaluations Received
APPROVED
NO
YES
Written Statement of Deficiencies Sent to Applicant. One of 2 Actions Taken
Not Approved
Probation
Approval Letter and Forms for Registry Sent to Provider
Provider Fills Out Registry Forms
Forms Received and Approval Status Sent to National Registry
Approved Provider Entered in National Registry System
Review of Process with National Council Members
Annual Research Report from ACT Registry
Publication of List of Approved Providers

SUMMARY OF REVIEW PROCESS FOR APPROVED PROVIDER STATUS BY THE NATIONAL COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION

What are the obligations of a provider in order to maintain approval status?

APPROVAL STATUS is granted for a period of three years, but during this time certain terms, or obligations, must be fulfilled by organizations, single offering providers, and Learning Consultants.

1. Entry of activities into ACT Registry

1. In conjunction with the National Registry for Continuing Education of the American College Testing (ACT) Program the National Council, in cooperation with the Continuing Library Education Network and Exchange (CLENE), will operate a national, computerized continuing education registry which will verify and record that an individual has completed an activity and been awarded credits, hours, or Continuing Education Units by a provider. The approved provider is responsible for submitting a course description form for each planned activity and for collecting Student Data Forms and the registry fees for all those participants' in an activity who wish to have their record entered into the registry. The fee is $3.00 per person. The provider mails these student data forms and a class/activity ID form to the ACT Registry.

2. Continuing evaluation of activities

2. Two types of evaluation activity are required:

- Approved providers are required to evaluate the effectiveness of their activities in meeting stated objectives on a continuing basis and to maintain records of these evaluation results. It is understood that the National Council may request review of these evaluation records.
- Approved providers are required to distribute the Registry Student Data Forms to all participants and to enter them into the Registry. In so doing, the providers indicate that they agree to the assessment of continuing education activities by means of the evaluation questions contained on the Student Data Forms. Approved providers will receive summaries of the evaluations of their activities.

3. Annual Report

3. Annual Report. Approved providers must submit a brief annual report of their activities. This report should include evaluative summaries of the effectiveness of the activities in meeting stated objectives.

4. General Provisions

4. General Provisions of the Provider Approval System (see pages 43-49 of the Program Document). All program activities of an approved organization and of the approved single offerings will be listed in CLENE's Continuing Education Communicator (a calendar of Continuing Education Offerings issued 11 times a year). Notification of offerings should be received 60 days in advance of the activity. All program activities of an approved organization and those approved single offerings that are repeated will be listed in CLENE's annual Directory of Continuing Education Opportunities. Both types of listings will be designated as approved. The standard notification form should be completed for each offering.

5. Annual Sustaining Fee

5. Approved providers wishing to maintain approval status will be charged an annual sustaining fee to cover the monitoring and announcement of the provider's continuing education offerings, ongoing assessment of quality of offerings, provider's procedures, and other administrative functions. The sustaining fee fee for the first year will be waived for those in the pilot study.

Appendix D

DRAFT #4

OUTLINE OF PROCEDURE FOR SITE VISITS OF CONTINUING EDUCATION PROVIDERS IN PILOT SURVEY

Purpose of the Site Visit

The site visit has two major purposes:

1. To obtain from the providers in the pilot study an evaluation of and suggestions for the improvement of the total provider approval process, including the Criteria for Quality.

2. To learn enough about the providers and their programs on location to determine if the forms and procedures set forth in the approval process truly get at the essential information necessary to make a reasoned value judgment to approve or not to approve the providers.

The attitude of those making the visit might be characterized as one of "thinking together." The visit is not an investigation, however, though many facets of the provider's operations may be discussed. It has been found from experience, that visitors can raise questions which both elicit information and stimulate thinking.

It should be noted that visits can occur at any stage of the approval process--before an offering is given, during an offering, or after an offering (which may include talking to a sampling of participants).

Steps and Procedures in the Site Visits

1. After the review of the Application for Approval Status has been completed by the National Council on Quality Continuing Library Education, a Project Staff member will arrange specific date and time for the site visit with the provider indicated on the application form as the one chiefly responsible for the continuing education offerings.

2. The Council will decide on which of its members and staff will visit a given provider. Typically the visitation team will number two persons: one member of the Council (a person experienced in planning and directing continuing education programs) and one member of the Project Staff. However, it may be that funding limitations will necessitate visits to be made by only one person, for example by the council member living in closest proximity to the provider. In some instances a site visit may not be possible and the information sought will be obtained by means of a conference telephone call.

3. The purpose and procedures of the visit and those who make the site visits will be discussed by a member of the Project Staff with the Provider in advance of the visit.

4. A maximum of four hours will be scheduled for the site survey.

5. All those making the site visit will have copies of all of the application data submitted by the provider and will have reviewed it carefully before arriving at the site.

6. Upon arrival at the site, the team usually will meet with the the person in charge of the continuing education programs and others involved in an administrative manner with the program. A major purpose of this meeting is to provide for mutual acquaintance and agree upon a schedule and plan of procedure.

7. Typically about half of the time will be used to discuss the approval process which has just been carried out by the provider in order to obtain the provider's suggestions as to suggested improvements that might aid the system.

8. The remaining time will be spent in seeking information about the program, to determine if the written forms are, indeed, soliciting the information necessary for Council members to make a realistic value judgment on whether a provider should be approved. Thus, topics covered will include: administration, faculty, budget, curriculum, physical facilities, educational methods used, methods of evaluation, and recognition given.

    The emphasis in visiting organizational sponsors will be upon the organizations rather than on individual courses or programs. Thus, questions would generally pertain to such topics as the the following:

    - Determination of whether an organization has adequate resources to carry on programs, including faculty, physical facilities, and funds;
    - Determination of whether the provider is genuinely accepting responsibility for the conduct and quality of the courses and/or activities offered;
    - Determination of whether a significant portion of the provider's resources is being used for continuing education programming;
    - Determination whether the promotional material is handled in an honest and ethical manner, i.e. are educational objectives stated clearly, are the credentials of the faculty made known, is the amount and type of credit that can be earned stated specifically, are cancellation and refund policies stated explicitly, etc.
    - Determination whether stated objectives are being met.

    Thus, in organizational approval the object is really to determine if the provider is qualified to present continuing education opportunities that meet the Criteria for Quality, rather than that each individual offering meet certain minimum criteria of excellence.

    The emphasis in visiting sponsors of a single offering will be on the the offering itself.

The emphasis in visiting a Learning Consultant will be on the mechanisms the Counsultant has developed to oversee the learning program of those served as a Consultant.

9. All data, observations, conversations, findings, and reports related to information on the application form and the visit will be kept confidential and only divulged to the Council.

10. Immediately following the visit the team will meet in executive session to consolidate notes, discuss their observations, agree upon their findings, and write a report for the Council. This report will serve the following purposes:

- It will enable the National Council to understand and evaluate the provider seeking approval and to determine if the written data sought from the provider is the type that gives an accurate picture of the real situation, or if modifications in the forms should be considered.
- It will help the National Council evaluate the total approval process and consider changes suggested by the provider who has gone through the process.

Concluding Note:

It is considered extremely important that the developing approval program do no harm to organizations offering programs of value to information, library, media practitioners. The intent is not to penalize any provider, but rather to assure the participants that their interests are being protected. For this reason, it is likely that early appraisal of survey findings will be cautious, with every effort made to assure that no harm is done to worthwhile programs.

On the other hand, however, it is inevitable that some programs will be disapproved. Were this not the case there would be no real authority in the process and no direct incentive to providers to improve the quality of their offerings.

As the provider approval system develops there will certainly be evolutionary changes as the procedures and process are used, even as changes are expected to be made in the system as a result of the pilot visits.

APPENDIX E

PILOT SURVEY -- INTERVIEW INSTRUMENT

PILOT SURVEY -- INTERVIEW INSTRUMENT

LEARNING CONSULTANT VERSION

PILOT SURVEY -- INTERVIEW INSTRUMENT

1. Overview of organization. How it is organized for C.E. Special relationships.

2. Overall Design -- Criteria for Quality
   - Criteria
     - what is missing
     - what is unnecessary
   - Assessment Factors
     - which are too strong
     - which are too weak
     - what is missing
     - what is unnecessary

3. Overall Design -- Provider Approval System
   - Comments on the three categories of approval
   - Comments on the bi-level councils
     - composition = # of members -- how chosen
     - scope of each = division of authority between National and State -- by audience - by subject scope - by kind of sponsor
   - Opinion of three year length of approval
   - Opinion on monitoring -- probationary status -- preliminary status
   - Comments on appeals process
     - adequate?
   - Opinion on co-sponsorship
     - division of accountability -- mechanics of approval
   - Opinion on contracting
     - responsibilities of contractor and contractee
     - accountability

4. Form

   Did you need or desire guidelines or instructions (question by question)

   Views on information asked for
   - unnecessary
   - omitted

   Views on how information was asked for -- how it was to be provided
   - content and layout (format)

   Specific questions by number
   - vague/unclear
   - unwieldy

   How long did it take to complete the form?

5. What should we know about your program that is important and would be of value to us?

6. We would like to ask questions on your program -- will have been covered in the form but we want to validate the form as effective in eliciting needed information

PILOT SURVEY -- INTERVIEW INSTRUMENT
LEARNING CONSULTANT VERSION

1. Discussion of the Learning Consultant concept
    - --one-to-one relationship
    - --based on the individual's needs
    - --learning objectives developed each time
    - --learning strategies designed to meet each person's needs and objectives
    - --evaluation of success in meeting objectives

   Comments on design/concept

   Opinion on need for two versions:
    - L.C. in specific subject areas
    - L.C. as an expert in the mechanism to be applied to any subject area

   Comments on feasibility of L.C.
    - identification of problems

   Comment on their own willingness to function as a L.C. according to our design

   Views on an individual who develops group offerings applying for approval as an "organization"

2. Overview of framework from which they operate as a Learning Consultant.
    - relationship to thier regular employer, if any

3. Overall Design -- Criteria for Quality

   Criteria
    - what is missing
    - what is unnecessary

   Assessment Factors
    - which are too strong
    - which are too weak
    - what is missing
    - what is unncessary

4. Overall Design -- Provider Approval System

   Comments on the three categories of approval

   Comments on the bi-level councils
    - composition = # of members -- how chosen
    - scope of each = division of authority between National and State
        - -- by audience - by subject scope - by kind of sponsor

   Opinion on three year length of approval

   Opinion on minotoring -- probationary status -- provisionary status

   Comments on appeals process
    - adequate?

   Opinion on co-sponsorship
    - division of accountability -- mechanics of approval

   Opinion on contracting
    - responsibilities of contractor and contractee
    - accountability

5. Form

   Did you need or desire guidelines or instructions (question by question)

   Views on information asked for
    - unnecessary
    - omitted

   Views on how information was asked for -- how it was to be provided
    - content and layout (format)

   Specific questions by number
    - vague/unclear
    - unwieldly

5. Form, continued
How long did it take to complete the form?
Comments on the annual report form for a Learning Consultant

6. What should we know about your program that is important and would be of value to us?

7. We would like to ask questions on your program -- will have been covered in the form but we want to validate the form as effective in eliciting needed information

APPENDIX F

A PROGRAM FOR QUALITY IN CONTINUING EDUCATION FOR INFORMATION, LIBRARY, AND MEDIA PERSONNEL:

VOLUME ONE

POLICY STATEMENT AND CRITERIA FOR QUALITY

VOLUME TWO

PROVIDER APPROVAL SYSTEM

A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System

Volume One

Policy Statement and Criteria for Quality

The activity which is the subject of this report was supported in whole or in part by the U. S. Department of Education, Office of Libraries and Learning Technologies. However, the opinions expressed herein do not necessarily reflect the position or policy of the U. S. Department of Education, and no official endorsement by the U. S. Department of Education should be inferred.

National Council on Quality Continuing Education for
Information, Library, Media Personnel

1980

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INTRODUCTION

The Program for Quality in Continuing Education[1] for Information, Library, and Media Personnel[2] was established as part of a research and development project funded by the Office of Education in conjunction with CLENE, Inc. (the Continuing Library Education Network and Exchange). The Program consists of (1) a policy statement specifying the definition, goals, and benefits of continuing education; (2) Criteria for Quality continuing education; and (3) a system for the approval of providers of continuing education. The Program is outlined in this document: Volume One, Policy Statement and Criteria for Quality and Volume Two, Provider Approval System. A brief history of how the Program was developed is presented in Appendix A of Volume One.

The Program for Quality is designed to be administered by the National Council on Quality Continuing Education for Information, Library, Media Personnel. The Program is one component of a voluntary recognition service. It interacts with the other components which are sponsored by CLENE: the CLENE National Continuing Education Registry, a voluntary recordkeeping system for each individual's continuing education participation, and the Statement of Acknowledgement for Continuing Education which recognizes individuals who have accrued a specified amount of continuing education.

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[1] Hereafter in this document, the term "continuing education" is used to refer to continuing education for information, library, and media personnel.

[2] Personnel includes all who work in or with information, library, and media services, including those involved in governance, management, operations, delivery of services, and public relations.

SECTION ONE

POLICY STATEMENT ON QUALITY
CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

Definition

Definition of Continuing Education

Continuing education is a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with information, library, media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn. It is broader than staff development which is usually initiated by an organization for the growth of its own human resources.

Goals and Objectives

Goals and Benefits

Continuous learning is an obligation of all those who work to identify, select, organize, retrieve, disseminate, and make accessible the record of human thought and actions. The goal of continuing education is to improve information, library, media services by maintaining or improving competence of practitioners.

Regular participation in continuing education activities enables the practitioners to

- refresh basic education by mastering new concepts in a constantly changing environment
- keep up with the new knowledge and skills required to perform their roles responsibly
- prepare for specialization in a new area
- enjoy the intrinsic satisfaction resulting from learning.

Scope

Scope

A wide variety of learning opportunities is available both on the job and outside the work place. These opportunities include both formal and informal learning activities and exist independently or under the guidance and sponsorship of various institutions, associations, and other organizations. Appropriate subject areas are defined broadly to include all related disciplines that help participants to practice with competence, thereby granting individuals wide latitude in selecting subject matter and format appropriate to their present or future needs. Although individuals assume primary responsibility for their own development, continuing education encompasses shared responsibility, cooperation, and interaction among a number of library and educational agencies, relevant federal agencies, and a wide variety of professional and other educational associations at the local, state, regional, national, and international levels.

Need for Assurance of Quality

Need for Assurance of Quality

Due to the rapid changes occurring throughout the information, library, media fields, and indeed, the society they serve, people sought means to keep abreast of the new developments. This "demand" was met by a "supply" of numerous and various continuing education activities from many sources. In quality and effectiveness, they ranged from excellent to unspeakable. Inadequate attention was being given to the quality of the activities and there was a lack of coordination.

The members of the information, library, media community suffered the consequences of the unevenness and asked that something be done to upgrade the quality of the programs and to institute a form of accountability to assure that the programs justify the time, energy, and costs expended by the participants, by their employers, and by the providers themselves. Establishing Criteria for Quality continuing education is the first step. Instituting a provider approval system to provide accountability is the second step.

SECTION TWO

CRITERIA FOR QUALITY FOR CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

The delivery of quality continuing education programs appropriate to the needs of people involved in information, library, media services must be based on careful planning.

A number of factors should be used in assessing the planning, design, delivery, and evaluation of these programs. These Criteria for Quality are used in the voluntary continuing education provider approval system. These Criteria can be applied by any person or group interested in providing quality continuing education opportunities regardless of whether or not they choose to apply for approval status.

CRITERIA FOR CONTINUING EDUCATION PROGRAMS AND ACTIVITIES

Group Programs and Activities

Group Programs and Activities

A group program or activity is one where the participant learns a given subject through interaction with an instructor and other participants. This includes such gatherings as academic courses, institutes, workshops, seminars, and short courses.

Needs Assessment

Needs Assessment

CRITERION 1: *The specific needs of the client group have been assessed.*

Assessment Factors:

1. Has the target group been clearly identified?
2. Has a systematic needs assessment been conducted?
3. Have representatives of the target group participated actively in the needs assessment process?

Objectives

Objectives

CRITERION 2: *Specific, measurable, and/or observable learning objectives have been stated in one or more of the following areas: (1) changes in attitude and approach to the solution of problems; (2) acquisition (or mastery) of new knowledge or the revision of outdated knowledge in specific skills, techniques, and procedures.*

Assessment Factors:

1. Are the objectives based on the needs assessment?
2. Do the objectives describe the expected outcomes for the participants?
3. Are the objectives measurable/observable?
4. Do the objectives address changes in the participant's work performance as a basis for evaluating impact?

Design and Presentation

Design and Presentation

CRITERION 3: *The program is systematically designed and delivered to meet the statement of objectives.*

Assessment Factors:

1. Are instructional strategies, i.e., learning experiences, teaching methods, and content materials appropriate and effectively employed in achieving the objectives?
2. Are person(s) knowledgeable in the content area as well as instructional design involved in planning and conducting the educational offering?
3. Does the design consider the participant's entry level competency?

4. Is sufficient time allotted for the participant to meet the objectives?
5. Is consideration given to individualization, such as learning styles, pacing, and assimilation rate?
6. Are principles of adult education, including involvement, self-direction, and reinforcement included in the design of the program?

Timeliness

Timeliness

CRITERION 4: *The program content is current and timely.*

Assessment Factors:

1. Are the concepts presented up-to-date with the current ideas, trends, facts, etc.?
2. Is the program content reviewed periodically to assure it is accurate and consistent with currently accepted practices and techniques?

Promotion

Promotion

CRITERION 5: *The educational offering is promoted responsibly.*

Assessment Factors:

1. Is the promotion directed at the audience that may best benefit from the activity?
2. Does the promotional material include the following:
   - a. the scope of the subject content
   - b. a statement of the objectives in terms of learner outcomes
   - c. the nature of the target audience
   - d. the level of the offering, i.e., beginning, intermediate, advanced, or overview
   - e. the location, time, and schedule of activities
   - f. the name(s) and qualifications of the presentor(s)
   - g. the cost, the items covered by the cost, and provisions for refund
   - h. the amount and kind of credit being offered
   - i. the provision of a systematic process to record the continuing education activities of the individual participants
   - j. the preparation, if necessary, which participants should engage in prior to the program
   - k. a description of the learning activities, methods, and resources used in the program?

Evaluation

Evaluation

CRITERION 6: *Evaluation is an on-going and integral part of the education offering.*

Assessment Factors:

1. Is the evaluation based on the stated objectives?
2. Does the evaluation cover the starting point, the process, and the outcomes of the learning experience, i.e., pre-test, interim test, and post-test?
3. Do the evaluation procedures include provision for adjusting the program in response to new needs identified during the course of the program?
4. Does the evaluation assess the appropriateness of the content as well as the effectiveness of the materials and techniques employed?
5. Does the evaluation include the performance of the presentors and staff?
6. Does the evaluation include adequacy and appropriateness of the facilities?
7. Where confidential or sensitive materials or results are involved, does the evaluation process take into consideration ethical handling of these items?
8. Have the evaluation procedures been reviewed by a qualified, unbiased person?
9. Are the evaluation results made known to the participants?
10. Are evaluation results used to improve future programs?
11. Does the evaluation process clearly indicate that the participant has the right to express grievances or report unethical procedures?

Individualized Programs and Activities

Individualized Programs and Activities

The Criteria for group programs (pp. 4-5) and instructional materials (pp. 7-8) are applicable to individualized continuing education learning activities. In applying the Criteria to the design and accomplishment of an individualized continuing education activity, special attention must be given to the following additional points:

Needs Assessment

Needs Assessment

CRITERION 1: *The individual's specific learning needs or interests have been identified and assessed.*

Assessment Factors:

1. What needs assessment process has been followed, e.g., self-assessment?
2. What are needs or interests based upon, e.g., job, career growth, personal interest, etc.?
3. Are colleagues consulted or outside resources utilized in determining needs?

Objectives

Objectives

CRITERION 2: *Based on the self-assessment, a set of clear, measurable, and/or observable learning objectives have been stated in one or more of the following areas: (1) changes in attitudes, (2) updating of outdated knowledge and/or attainment of new knowledge, and (3) awareness or mastery of specific skills and techniques.*

Assessment Factors:

1. Are the objectives clearly stated?
2. Are the objectives appropriate in meeting the assessed needs?
3. Will the objectives contribute to the competence of the individual?
4. Are the objectives reasonable and attainable given the individual's current expertise and the available resources and time?
5. Do the objectives specify the expected outcome for the individual in terms of the level of knowledge or performance skill that is expected to be attained?
6. Are the objectives stated so they can be evaluated? How will the individual know or be able to demonstrate achievement of each objective?
7. Do the objectives address changes in future role performance of the individual as a basis for evaluating impact?

CRITERION 3: *The learning objectives are relevant to improved information, library, media services.*

Assessment Factors:

1. Is the content related to present and future responsibilities?
2. Are the skills relevant to present and future responsibilities?
3. How has relevancy been determined?

Learning Plan

Learning Plan

CRITERION 4: *An organized and coherent series of learning activities is systematically planned to achieve the individual's stated objectives.*

Assessment Factors:

1. Are learning activities appropriate to the objectives?
2. Do the activities utilize appropriate materials, resources, or persons expert in the content/skill area?
3. Are learning activities organized, sequenced, and paced so as to be manageable and to build effectively upon each other?
4. Are appropriate and effective individual educational strategies/techniques employed?
5. Are the activities at the appropriate level for the individual's competency base?

CRITERION 5: *The individualized learning activities are carried out in a timely, responsible, and effective manner following the learning plan.*

Assessment Factors:

1. Has the plan of activities been followed?

2. Are resources and experts utilized as planned?
3. Is adequate time allocated to achievement of the objectives of each activity?

Evaluation

Evaluation

CRITERION 6: *Evaluation is an on-going and integral part of the individualized continuing education activity.*

Assessment Factors:

1. Is the evaluation based on the stated objectives?
2. Does the evaluation cover the starting point, the process, and the outcomes of the learning experience?
3. Does monitoring provide opportunity for reassessment of objectives and adjustment of the program in light of newly realized needs/interests or unrealistic expectations?
4. Do the monitoring and evaluation look at appropriateness of the content and resources and the effectiveness of learning strategies?
5. Do monitoring and evaluating effectively assess the individual's level of achievement of the objectives and provide opportunity for corrective efforts?
6. Is the monitoring and evaluation process carried out with appropriate review, assessment, or consultation with a qualified, unbiased person?

Instructional Materials

Instructional Materials

"Instructional materials" is one of many terms applied to the broad area of educational techniques that go beyond the live instructor speaking to a group of learners. This includes (1) teaching aids (i.e. audiovisual materials used by the instructor in the group program or activity), (2) mediated delivery of programs (e.g., open and closed circuit television or broadcasts by radio or satellite), and (3) self-instructional materials for individual learners (e.g., programmed texts, multimedia kits, and computer assisted instructional programs).

All instructional materials must be designed, developed, and/or utilized in a manner consistent with the tenets for quality in all educational programs. Some types require special considerations due to their nature.

Entry Level Competencies

Entry Level Competencies

CRITERION 1: *The instructional materials are suited for the learning audience.*

Assessment Factors:

1. Is the stated level of the instructional material the same as the learning audience, e.g., beginner or novice, moderate-level, or expert?
2. Is there a list of entry level competencies for the instructional materials and/or a test of these competencies?
3. Is there a list of terms or jargon that must be known before the instructional materials can be used?

Objectives

Objectives

CRITERION 2: *A set of clear, measurable, and/or observable learning objectives have been stated in one or more of the following areas: (2) changes in attitude; (2) updating of outdated knowledge and/or attainment of new knowledge; and (3) awareness or mastery of specific skills and techniques.*

Assessment Factors:

1. Are the objectives measurable/observable?
2. Do the objectives specify the expected outcome for the individual in terms of the level of knowledge, attitude, or performance skill that is expected to be attained?

Learning Strategies

Learning Strategies

CRITERION 3: *The instructional materials utilized are suitable and appropriate for the objectives of the learning activity.*

Assessment Factors:

1. Are several types of media used to accommodate different learning styles and preferences?

2. Is a variety of media used to stimulate the participant's interest and motivation?
3. Are the instructional materials suitable for the chosen mode of instruction, i.e., large-group, small-group, or independent study?
4. Are the instructional materials used for a variety of purposes: to set a mood or foster an attitude, to present facts, to illustrate or augment existing facts, to summarize a topic, or to evaluate or test learning?

Timeliness

Timeliness

CRITERION 4: *The instructional materials are current and timely.*

Assessment Factors:

1. Are the concepts presented up-to-date with the current ideas, trends, facts, etc.?
2. Are the illustrations timely:
   a. appropriate to the historical period covered, or
   b. reflective of today's culture, styles, and equipment?
3. Is the production date or revision date explicitly listed?

Learning Environment

Learning Environment

CRITERION 5: *The instructional materials are utilized in an appropriate facility and learning environment.*

Assessment Factors:

1. Is the size of the room appropriate for the instructional material?
2. Is the lighting adequate for the instructional media?
3. Is the layout of the room appropriate for the instructional media?
4. Is the room equipped with the necessary electrical wiring, sound system, screen(s), and furniture to accommodate the equipment used by the instructional materials?

Package or Module Design

Package or Module Design

CRITERION 6: *An instructional material package (or module), whether produced or purchased, is a complete and integrated unit and is well documented.*

Assessment Factors:

1. Is there a statement of objectives for the material?
2. Is the target audience identified?
3. Are the credentials of the subject matter experts provided and are they satisfactory?
4. Is evidence supplied that the producer tested and revised the material? Are the characteristics of the trial group sufficiently similar to this group of participants?
5. Is the technical quality adequate so there is good clarity, accurate exposure, synchronization, no distortion, etc.?
6. Does the presentation of the content match the attributes of the medium?
7. Is there an instructor's kit which includes
   a. an instructor's guide
   b. questions for discussion
   c. additional problems or exercises
   d. materials for display or demonstration
   e. copies of visuals and audio materials used in the audiovisual program
   f. additional or supplemental materials for distribution?
8. Is all equipment needed to utilize the instructional materials standard, or, if not, are specific hardware specifications given?
9. If developed as a self-instructional package, is there a learner's kit which includes
   a. a set of instructions
   b. a list of learning goals and objectives
   c. a workbook or other types of problems or exercises
   d. copies of visuals and audio materials used in the audiovisual program
   e. evaluation instruments, both interim and final

   f. additional or supplemental material
   g. suggestions for enrichment or further study?

CRITERIA FOR CONTINUING EDUCATION PROVIDERS

Provider Criteria for Group Activities

Provider Criteria for Group Activities

Organizations or individuals providing continuing information, library, media education should use the following criteria and assessment factors to assess their capability to design and deliver appropriate educational experiences.

Administration

Administration

CRITERION 1: *A structure for systematic administration of the continuing education programs is established.*

Assessment Factors:

1. Is one individual assigned the ultimate responsibility for administering the program?
2. Is the assigned individual qualified to carry out his/her responsibility by virtue of background and experience?
3. Is there continuity of administration?
4. Is there evidence of careful long range planning for the overall program?

Human Resources

Human Resources

CRITERION 2: *Continuing education presentors, designers, and other human resources demonstrate current expertise by training and experience in the pertinent subject matter and/or educational methodologies.*

Assessment Factors:

1. Are the presentors and human resources adequate in number for the type of learning method used?
2. Do the human resources have expertise, not only in subject matter, but in setting educational objectives, teaching, and assessment of educational results of the program?
3. Do the presentors have the ability to facilitate learning and communicate?
4. Are appropriate adult education methods used in the program?

Facilities

Facilities

CRITERION 3: *Adequate facilities conducive to good learning are desirable for effective continuing education programs.*

Assessment Factors:

1. Is there appropriate and sufficient space for the educational methods used, including learner participation?
2. Do facilities include pertinent and adequate library resources, space for conferences, audiovisual equipment, and other resources as needed?

Budget

Budget

CRITERION 4: *The budget is adequate to support the educational program.*

Assessment Factors:

1. Is there evidence of sound fiscal planning and management, e.g., a clearly identifiable component of the total budget earmarked for continuing education?
2. Does the budget include (as needed), the following:
   a. clerical and secretarial services
   b. audiovisual and other pertinent equipment
   c. supplies and promotional materials
   d. travel and other related costs?
3. Have financial resources to augment participant fees been sought to support the program?

Criteria for Learning Consultants

Criteria for Learning Consultants for Individualized Continuing Education Programs

Individuals may pursue learning activities by themselves, or if they seek approval, with the outside assistance of a Learning Consultant. A Learning Consultant can be approved by demonstrating his/her competence and expertise in planning and evaluation of educational programs. With that approval, the Learning Consultant is delegated the privilege of confering approval to an individual's learning activity.

Persons wishing to be approved as Learning Consultants for individualized continuing education activities must show evidence of meeting the following criteria:

CRITERION 1: *The Learning Consultant is able to demonstrate competence in planning and evaluation of education programs, especially those involving individualized learning.*

CRITERION 2: *The Learning Consultant has knowledge or access to expertise in the specialty area being pursued by the individual learner.*

CRITERION 3: *The Learning Consultant has an articulated plan as to*

- a. *the content areas and level of training he/she is qualified to supervise*
- b. *the kind of advisor services he/she is prepared to give*
- c. *the general model that will be followed in the assessment of learning needs and the development, monitoring, and evaluation of activities.*

CRITERION 4: *The Learning Consultant will assume the ultimate responsibility for the attainment of the individual participant's learning goals.*

CRITERION 5: *When an organization or association makes available the services of Learning Consultants, each individual Learning Consultant has been approved.*

APPENDIX A

HISTORY

The Program for Quality in Continuing Education represents the culmination of a series of events, activities, and research efforts.

- 1973. A nationwide survey of practitioners and of continuing education providers was funded by the National Commission on Libraries and Information Science (NCLIS).[1] This study found serious unevenness in the quality of continuing education and an interest in a voluntary recognition system that included a provision for assurance of quality in programs.
- The Continuing Library Education Network and Exchange (CLENE) was organized during the annual American Library Association Conference in San Francisco at a meeting called by NCLIS who served as a catalytic agent. The first meeting of the Board of Directors was held in September.
- 1976-1977. A CLENE research project was funded by the U.S. Office of Education. A model for a voluntary recognition system was designed.[2] The major elements of a recognition system were identified as (1) criteria and guidelines for quality continuing education single offerings and/or total programs, (2) a voluntary approval system for providers and recognition of approved providers, (3) a voluntary recordkeeping system for each individual's continuing education and a way of recognizing these efforts, and (4) support services for the individual participants engaged in continuing education such as the development of self-assessment tools, and for the providers of continuing education, such as a handbook to assist in attaining the Criteria for Quality.
- 1977 (October). The CLENE Board of Directors endorsed the concept of a voluntary recognition system for continuing education and accepted a leadership role in implementing such a system. A Task Force was appointed to develop a plan for the implementation of the recognition system.
- 1978 (January). The CLENE Task Force presented the concept of a voluntary recognition system at an open meeting at the American Library Association Midwinter Conference. This was followed by many other meetings held nationwide to describe the system and to obtain feedback.
- 1978 (June). A National Conclave was called by CLENE under the direction of the Task Force. Representatives of the major information, library, media associations and organizations were invited to attend. Conclave participants concluded that there is a need for some type of quality assurance for continuing education activities and programs.
- 1979-1980. A CLENE research project was funded by the U.S. Office of Education under the Title II-B of the Higher Education Act to develop and demonstrate Criteria for Quality for Continuing Education providers. The project entailed (1) forming a seven member Council on Quality Continuing Library Education: Information--Library--Media Programs; (2) developing a policy statement on continuing education which includes its definition, objectives, and rationale; (3) developing Criteria for Quality for continuing education activities; (4) devising procedures for a voluntary provider approval system for continuing information, library, media education; and (5) conducting pilot surveys of selected providers of continuing education to test the Criteria for Quality as a basis for evaluating and approving programs. The Council used the CLENE model of a recognition system designed by the 1976-1977 research project as a basis for its work as well as the criteria and guidelines for providers that have been developed and implemented by other professions such as the American Psychological Association, the American Pharmaceutical Association, the American Institute of Certified Public Accountants, the American Medical Association, and the American Society for Medical Technologists.
- 1979 (Summer). The Task Force recommended and the CLENE Board of Directors approved the adoption of the National Registry System of the American College Testing (ACT) Corporation as means to provide a voluntary recordkeeping system for individuals who participate in continuing education activities.

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[1] Elizabeth W. Stone, Ruth J. Patrick, and Barbara Conroy, Continuing Library and Information Science Education, Final Report to the National Commission on Libraries and Information Science (Washington, D.C.: American Society for Information Science, 1974).

[2] Elizabeth W. Stone, Eileen Sheahan, and Katherine J. Harig, Model Continuing Education Recognition System in Library and Information Science (New York: K.G. Saur, 1979).

The Council

APPENDIX B

COUNCIL ON QUALITY CONTINUING LIBRARY EDUCATION:
Information--Library--Media Programs

1979 -- 1980

MEMBERS

William Asp, Chairman
Chair of COSLA and Director
Office of Public Libraries and Interlibrary Cooperation

Bernard Franckowiak, Ph.D.
Dean, Graduate School of Librarianship and Information Management
University of Denver

John Hinkle
Continuing Education Coordinator
Oklahoma Department of Libraries

John G. Lorenz
Former Executive Director
The Association of Research Libraries

Margaret Myers
Director, Office for Library Personnel Resources
American Library Association

Debra Nygaard
Former Director of Continuing Education
American Psychological Association

Ruth J. Patrick, Ph.D.
Chair, Recognition System Task Force, CLENE, and Assistant Director
University Libraries
Wayne State University

EX-OFFICIO MEMBERS

Gary Purcell, Ph.D., Project Evaluator
Professor, Graduate School of Library and Information Science
University of Tennessee

Alphonse F. Trezza
Executive Director
National Commission on Libraries and Information Science (NCLIS)

Elizabeth W. Stone, Ph.D., Project Director
Chair, Graduate Department of Library and Information Science
The Catholic University of America

Micki Jo Young, Ph.D., Principal Investigator
CLENE Quality Continuing Library Education Project

Susan Viola, Research Associate
CLENE Quality Continuing Library Education Project

Will Adams, Project Secretary
CLENE Quality Continuing Library Education Project

GLOSSARY

Accreditation - The process by which an authorized agency or organization evaluates and recognizes a program of study or an institution as meeting certain predetermined qualifications or standards. See also: *Approval*, *Certification*, and *Licensure*.

Activity - An individual educational experience or offering, such as a lecture, Home Study course, workshop, seminar, symposium, etc; a discrete but coordinated component of a PROGRAM designed to produce results that help to achieve program objectives as well as more specific education objectives.

Adult Learning - The study of how adults learn compared to how youth learn. Classic works in the field are done by Knowles, Houle, and Knox.

Approval - The act of approving; formal permission or sanction. Approval is less stringent, less formal, and carries less weight than *Accreditation*, *Certification*, or *Licensure*.

Certification - The process by which a nongovernmental agency or association grants recognition to an individual who has met certain predetermined qualifications specified by that agency or association. See also: *Accreditation*, *Approval*, and *Licensure*.

Competency - Ability, skill or fitness based on meeting certain minimum requirements.

Conference - A general type of meeting usually of one or more days' duration, attended by a fairly large number of people. A conference will have a central theme but is often loosely structured to cover a wide range of topics. The emphasis is on prepared presentations by authoritative speakers, although division into small group sessions for discussion purposes is often a related activity.

Consultant - A qualified individual who gives advice or services regarding matters in his/her area of specialized knowledge or training.

Contact Hour - A standard unit of measurement commonly equated to 50 minutes of participation in an organized learning activity.

Continuing Education - Planned learning experiences utilized by individuals following their preparatory education necessary for entrance into the field. Continuing education is a generic term which includes staff development as one of its elements. Similarly, in-service training and orientation are subsets under staff development. Whereas continuing education takes as its base the individual, staff development uses as its base the development of the group as it relates to the total organization system. Continuing education opportunities include both formal and informal learning situations, and need not be limited to library subjects or the offerings of information science schools.

Correspondence Course - A formal, independent study program consisting of reading and exercises submitted to a knowledgeable instructor for evaluation. The course usually covers several lessons to be completed in a specified period. See also: *Home Study*.

Course - A program of instruction as in a college or university; a series of sessions prepared for a group by the instructor usually with a well-defined subject and scope. Commonly focused on the dissemination of knowledge, but sometimes may include skills building or attitudinal training.

Criterion - An established rule or standard of judgement accepted as a basis for comparison or evaluation.

Educational Technology - The broad application of scientific processes to the solution of educational problems and the fulfillment of learners.

Educator/Educational Staff - Individuals with the prime responsibility for the conduct of the learning experience; those who enable learning through skilled and deliberate efforts, those agents of learning upon whom much of the success of each activity will depend. Synonymous terms include teachers, instructors, faculty, facilitators, leaders, trainers, consultants, and resource people.

Evaluation - The process of delineating, obtaining, and producing relevant information for effective, on-going decision making and for accountability.

Formative evaluation - yields information that can be used for the development or improvement of an on-going program or activity.

Summative evaluation - gives evidence of results and provides a measure of the program or activity results.

Goal - Purpose; an intended direction or aim; an ultimate outcome; an overall definition of what a program or activity is to accomplish.

Institute - Generally similar to a conference, but more tightly structured to provide a more systematic development of its theme, with the emphasis more on providing instruction in principles and techniques than on general information. Participants are usually individuals who already have some competence in the field of interest. Institute programs may have certain continuity, meeting on a yearly basis for example.

Instructional Materials - Resources such as pamphlets, exhibits, annotated bibliographies, case histories, audiovisual materials and information briefs which assist in the learning process.

Internship - A training comprised of practical on-the-job experience in the profession for a specified period under the supervision of an experienced worker.

Journal Club - A group of individuals meeting periodically to study a topic of mutual interest using previously assigned resource materials as a guide to discussion.

Learning Consultant - A person qualified in the development and administration of individualized learning plans which include needs assessment, statement of objectives, selection of learning strategies, monitoring of progress, and evaluation of achievement. A Learning Consultant can be approved by a Council on Quality Continuing Library Education.

Library Personnel Interchange - Exchange of librarians; an arrangement by which two libraries lend to each other simultaneously one or more staff members for a limited period.

Licensure - The process by which an agency of government grants permission to persons meeting predetermined qualifications to engage in a given occupation and/or to use a particular title; or grants permission to institutions to perform specified functions within their jurisdiction. See also: *Accreditation, Approval* and *Certification.*

Learn - To acquire knowledge of or skill in by study, instruction or experience; to become informed of or acquainted with; to ascertain; to gain by experience, exposure to example, or the like.

Mediated Learning Modules - Learning units transmitted via an intermediate mechanism such as audio and/or video tape, telephonic transmission, etc. These incorporate instructional techniques which employ materials and procedures not dependent solely on the printed word. The term includes electronically delivered packages such as radio, television satellite, computer assisted instruction (CAI), telewriter, telelecture, etc.

Needs Assessment - Systematic process used to identify needs including both gathering and analyzing the information.

Non-individualized Method of Learning - Methods and programs which provide learning experiences at a pace that lies beyond the learner's control, including the use of tape, radio, and television.

Non-traditional Learning Experiences - Non-traditional programs, learning experiences, or methods of instruction are ambiguous terms. They are generally viewed as nearly all programs, experiences, and methods of instruction which are different from the typical campus and classroom-bound, teacher-led, face-to-face, lecture or seminar-type of instruction.

Objectives - Statements of criteria by which one measures the degree to which the purpose is achieved. The statements are made in terms of results to be achieved rather than methods to be used. Objectives are narrower than goals, are usually short range, are measurable.

> *Institutional Objectives* - statements that specify the kind(s) of behavior expected to occur in learners.
>
> *Program Objectives* - Statements that describe the intent, function, and results expected from the total learning program.

Offering - A continuing education activity or experience presented by or made available by a provider.

Performance Standard - That level of expertise on a given essential performance characteristic that is considered to be minimally acceptable.

Planned Program of Continuing Education - The concept of a planned program of continuing education involves the organized presentation of a body of knowledge so that the subject is comprehensively covered in sufficient detail to meet the educational objectives. By using appropriate objectives, very narrow or highly specific, continuing education programs can be developed so they meet the definition of a planned program of continuing education. A series of unrelated lectures dealing with different topics and covering only one or two points of each topic would not be a planned program of continuing education.

Practicum - Actual work by a student in one or several libraries for a definite period as part of a library school course of study or a training course in a library. Field work, field practice, and practice work.

Program - A coordinated variety of learning activities presented by an organization which may be sequentially planned over a substantial time span and may be directed toward defined objectives. A program includes many segments which are described as education offerings, activities, or courses. (Total continuing education programs.)

Provider - See *Sponsor/Provider*.

Recognition System - A system established and supported by various occupations to carry out activities such as the following:

1. recognize the individual who has achieved the voluntary requirements of the program;
2. implement a system of recordkeeping for continuing education;
3. implement criteria or standards for continuing education;
4. review or assist in the review of continuing education programs/offerings.

Self-Assessment - An evaluation by an individual of his/her own strengths and weaknesses.

Seminar - A small grouping of people with the primary emphasis on discussion under a leader or resource person or persons. Offers the advantages of guidance and expertise with in-depth discussion. Can be a one-time event or a series over a period of time.

Short Course - A sequential offering, as a rule under a single instructor, meeting on a regular basis for a stipulated number of class sessions over a short period of time (e.g., one to three weeks, etc.).

Sponsor/Provider - The institution, organization, or agency responsible for the development, implementation, evaluation, and recordkeeping of a continuing education offering or a total continuing education program. A Learning Consultant can be considered a sponsor/provider.

Staff Development - See *Continuing Education*.

Voluntary - Brought about by one's own free choice; given or done of one's own free will; freely chosen or undertaken, as opposed to something that is compulsory or legally mandated.

Workshop - Usually meets for a continuous period of time over a period of one or more days. The distinguishing feature of the workshop is that it combines instruction with laboratory or experimental activity for the participants. The emphasis is more likely to be on skill training than on general principles.

A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System

Volume Two
Provider Approval System

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National Council on Quality Continuing Education
Information, Library, Media Personnel

1980

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APPENDIX A 21

INTRODUCTION

The Program for Quality in Continuing Education[1] for Information, Library, and Media Personnel[2] was established as part of a research and development project funded by the Office of Education in conjunction with CLENE, Inc. (the Continuing Library Education Network and Exchange). The Program consists of (1) a policy statement specifying the definition, goals, and benefits of continuing education; (2) Criteria for Quality continuing education; and (3) a system for the approval of providers of continuing education. The Program is outlined in this document: Volume One, Policy Statement and Criteria for Quality and Volume Two, Provider Approval System. A brief history of how the Program was developed is presented in Appendix A of Volume One.

The Program for Quality is designed to be administered by the National Council on Quality Continuing Education for Information, Library, Media Personnel. The Program is one component of a voluntary recognition service. It interacts with the other components which are sponsored by CLENE: the CLENE National Continuing Education Registry, a voluntary recordkeeping system for each individual's continuing education participation, and the Statement of Acknowledgement for Continuing Education which recognizes individuals who have accrued a specified amount of continuing education.

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[1] Hereafter in this document, the term "continuing education" is used to refer to continuing education for information, library, and media personnel.

[2] Personnel includes all who work in or with information, library, and media services, including those involved in governance, management, operations, delivery of services, and public relations.

SECTION ONE

OVERVIEW OF THE PROVIDER APPROVAL SYSTEM

The voluntary Provider Approval System involves both an initial and an ongoing review of the capabilities of providers of continuing education. These providers--organizations or others who provide continuing education opportunities for individuals--may sponsor a planned program with a variety of activities, may sponsor a single offering, or may act as a Learning Consultant for individualized learning experiences. These types of sponsorship are reflected in the categories listed in the approval process outlined in this section.

Providers seeking approval are measured against the Criteria for Quality. These Criteria, as used in connection with the review and approval process, imply neither uniformity nor inflexibility. Indeed, the Criteria, as well as the review and approval process should operate to increase, rather than diminish, the freedom and responsibility of each provider organization for the continued improvement of the quality of its educational offerings. In addition to offering some assurance of acceptable quality, a provider approval system offers other benefits. It

- Enables providers to receive recognition for quality continuing education programs
- Focuses attention on the importance of continuing education as a means of improving information, library, media services
- Advances the quality of continuing education, thereby advancing practice in the field
- Requires periodic self-evaluation which encourages diversity of approach and experimentation in continuing education
- Provides a basis for uniform acceptance of continuing education activity among the states
- Provides feedback of information to providers about their offerings
- Provides information, library, media personnel with a dependable basis for selecting quality continuing education programs.

Categories of Provider Approval

Categories of Approval

There are three categories of provider approval: (1) approval of an organization's total continuing education program, (2) approval of a single offering of a provider, and (3) approval of Learning Consultants for individualized learning activities.

Approval of an Organization

Organization

An organization that meets the Criteria, thus demonstrating the capability and willingness to provide quality continuing education, can be approved to offer a wide range of continuing education activities. Some examples of information, library, media organizations that could seek this approval are education programs, associations, state agencies, consulting corporations, and individuals.

Approval of a Single Offering

Single Offering

Any provider can seek approval of a single offering which meets the Criteria for the Program for Quality. Single offering approval may be given for many of the same formats utilized by providers seeking approval as sponsoring organizations. Approval of a single offering can be requested by information, library, media institutions and organizations such as education programs, state agencies, associations, proprietary organizations, and individuals.

Learning Consultants

Approval of Learning Consultants for Individualized Learning Activities

Many informal activities can have the same merits of more traditional, formal educational programs or offerings. To facilitate quality, verify accomplishment, and award approval to these activities, Learning Consultants are approved as being qualified and delegated the responsibility for the application of the Criteria for Quality to individualized learning programs.

The Learning Consultant accepts accountability for the quality of each individual's activity. The activities are planned from the beginning under the guidance of the Learning Consultant.

Other Meritorious Learning Activities

Other Meritorious Learning Activities

In order to assure a level of quality, a continuing education provider approval system must by necessity impose certain structure and formality upon continuing education. It is acknowledged that much of continuing education is of an informal and continual nature and may not be part of a planned program or may not lend itself to a quality review and approval process. Such activities (i.e., reading, discussions with colleagues, preparation of books or articles, visitations to other libraries, etc.) are acknowledged as meritorious forms of continuing education. Although these activities may be part of a self-directed program approved by a Learning Consultant, they may be valuable as free-standing activities separate from the approval process. As such, however, it is not feasible to monitor and approve each of these as individual activities.

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SECTION TWO

NATIONAL AND STATE COUNCILS OF THE PROVIDER APPROVAL SYSTEM

Role of National and State Councils

Role of National and State Councils

The Provider Approval System functions at both the national and state levels. The National Council reviews and approves continuing education sponsoring organizations and agencies that are state, multistate, national, or international in scope and state or multistate councils.

State or multistate councils are integral components in the coordinated national provider approval system. The National Council delegates to state or multistate councils the review and approval of single offerings and local sponsoring organizations and agencies within its geographic area. The state or multistate councils also are delegated authority for approving the qualifications of Learning Consultants for individualized continuing education programs.

In the case where state or multistate councils have not been established, the National Council assumes responsibility for reviewing and approving continuing education offered in those areas.

The National Council

The National Council on Quality Continuing Education for Information, Library, Media Personnel

Nature and Composition

Nature and Composition

The National Council on Quality Continuing Education is an autonomous entity operating under the auspices of CLENE, Inc.

The National Council is composed of nine members appointed by the CLENE Board of Directors. Nominations are widely solicited from the information, library, media community. In appointing members, consideration will be given to those individuals with expertise in (1) continuing education program planning and delivery, and/or (2) administration, planning, and evaluation. Potential members should

- Be committed to promoting excellence in continuing education programs
- Have demonstrated leadership in activities associated with the promotion of continuing education development and delivery
- Support the promotion of continuing education for the information, library, media fields as a means of improving service to users
- Support the application of the Criteria for Quality for continuing education activities.

The composition of the National Council as a whole, to the greatest extent possible, should have representation

- From the major areas and levels of information, library, media practice and preparation
- Of a mix of users, providers, and continuing education experts
- Of individual characteristics such as, sex, age, and ethnic/cultural identity
- From various geographic regions
- From the for-profit continuing education sector
- Of expertise in the continuing education area from outside the profession.

The members of the National Council serve on a voluntary, non-fee basis.

Term

Term

Each member serves for three years. To ensure continuity, the terms are staggered so that three new members join the National Council every year.

Jurisdiction and Responsibilities

Jurisdiction and Responsibilities

The duties and responsibilities of the National Council are

- Evaluative; it
  - --Delegates certain approval responsibilities to state or multistate councils
  - --Reviews and approves organizations, single offerings, and Learning Consultants for individualized learning
  - --Monitors the quality of continuing education programs with Approved Status
  - --Administers the appeals procedure
- Administrative; it
  - --Interfaces with the CLENE National Continuing Education Registry and the Statement of Acknowledgement program
  - --Publishes the names of the organizations, single offerings, and Learning Consultants that have been approved by the National and state/multistate councils
  - --Maintains liaison with CLENE, Inc.
  - --Publishes an annual progress and financial report
  - --Reviews and revises the Criteria for Quality and the Provider Approval System procedures and makes recommendations to the CLENE Board of Directors for approval of policy changes for the Provider Approval System

At the national level, the focus of the provider approval is on the following institutions and organizations:

- National information, library, media associations
- State chapters of national organizations
- State library and media agencies
- State information, library, media associations
- Information, library, media education programs
- Multistate information, library, media associations
- Consortia
- Vendors

Administrative Structure

Administrative Structure

The National Council elects its officers: a chairperson, a secretary, and a treasurer. The National Council has a review cycle of four times a year. Review can be accomplished by Council meetings, conference calls, or subcommittee screening process, depending on the type of application, volume of activity, and other Council business.

Administrative Support

Administrative Support

The National Council seeks to be self-supporting. Administration costs not covered by fees collected are borne by CLENE. The CLENE Board of Directors will allocate an operating budget for the year. The National Council will be responsible for the expenditure of the funds within the budget.

The CLENE office is the administrative office of the National Council. The National Council is responsible for the supervision of the operation of its administrative duties.

Changes

Changes

Changes in the organizational structure of the National Council and to the guidelines and procedures of the Program for Quality will be made as needed after widespread input from all concerned. The National Council is responsible for the changes in the Criteria for Quality and will make recommendations on changes in the Provider Approval System such as the categories of approval and procedures. These recommendations will be submitted for policy approval to the CLENE Board of Directors.

State Councils

State and Multistate Councils

Organization

Organization

The State Council should be representative of a wide spectrum of interests, including statewide information, library, media associations, libraries of all types, personnel at all levels, and other groups benefitting from information, library, media continuing education.

It is recommended that the state library agency take the leadership role in convening, developing, and coordinating a state Provider Approval System. This agency is often the one agency within a state that has the necessary resources to commit to the task of improving continuing education opportunities on a statewide interdisciplinary basis. In those states where a state council may not be feasible, responsibilities may be assigned to a multistate council.

Jurisdiction and Responsibilities

Jurisdiction and Responsibilities

A State or Multistate Council for Quality Continuing Education is responsible for granting

- Provider approval of local organizations and agencies
- Approval of single offerings
- Approval of Learning Consultants for individualized learning.

Approval of single offerings by the State or Multistate Council encompasses those programs offered by an organization or agency not having provider approval from the National, State, or Multistate Council.

The primary focus of provider approval by the State or Multistate Council is upon the following institutions and organizations:

- Individual libraries or library systems, single type or multitype
- Information, library, media organizations which do not have statewide scope, e.g., county or city library associations
- Multicounty or local units of statewide organizations whose continuing education activities are not under administration of the statewide organization.

Provider approval of statewide information, library, media associations or organizations and library education programs is a responsibility of the National Council on Quality Continuing Education.

Relationship to the National Council

Relationship to the National Council

Each State or Multistate Council is responsible for development of Criteria for Quality continuing information, library, media education which recognize the differences among the states. For a compatible system, however, such Criteria for Quality should parallel national Criteria for Quality to the greatest extent possible.

Compatibility among state continuing education programs has these advantages:

- Encourages development and adherence to Criteria for Quality for continuing education programming
- Facilitates the compilation and transferability of records of individuals whose continuing education activity takes place in more than one state
- Provides a data base about continuing education that could be used in research
- Promotes acceptance of continuing education as an individual process of learning by facilitating recognition in continuing education activities.

State or Multistate Council Criteria for Quality shall be filed with the National Council for review and approval. State or Multistate Councils are also encouraged to use the National Register for recordkeeping to further encourage compatability and to eliminate this task at other levels.

SECTION THREE

THE PROCESSES OF APPROVAL

Approval of an Organization

Approval of an Organization

Many organizations, institutions, and groups offer numerous continuing education activities on an ongoing basis. An administrative structure is present to plan, develop, and coordinate the activities, each as a separate entity and as part of the entire program of activities. This administrative structure is reviewed to determine if it is sound and capable of producing activities that meet the Criteria for Quality. If it is so judged, the organization's total continuing education program is approved.

Types of Activities

Types of Activities

An organization, as an approved provider, can offer a variety of types of continuing education activities.

Formal information, library, media education organizations can offer:

- Academic courses
- Independent study
- Internships or practica

Any organization can offer:

- Institutes
- Workshops
- Seminars
- Short courses
- Home Study courses
- Mediated learning modules
- Programmed instruction materials
- Computer assisted instruction programs
- Electronically delivered modules (e.g., radio, television, satellite, electronic mailbox, teleconferencing)

In addition to demonstrating the ability to apply the Criteria for Quality to all of its continuing education activities, an organization which offers mediated learning modules, programmed instruction, computer assisted instruction, and/or electronically delivered modules must apply the "Criteria for Quality Instructional Materials." If an organization wishes to offer Home Study programs, it must apply the Home Study Council's "Standards for Accrediting Home Study Schools" along with the general provisions of this Council's Criteria for Quality.

Terms of Approval Status

Terms of Approval Status

Basis. Approval Status will be awarded to an organization on the basis of the Criteria for Quality specified in Volume One. The "Criteria for Continuing Education Providers" will be applied to the organization in terms of how it can design and implement its activities to meet the "Criteria for Continuing Education Programs and Activities."

Length. The standard length of approval shall be three years.

Types. Approval Status is awarded when the National Council judges the organization to adequately meet the Criteria for Quality.

Probation Status is awarded to an organization which had previously been approved but is judged as no longer meeting the Criteria. The organization has a designated period of time (not to exceed nine months) to make the necessary changes and improvements to earn the Approved Status.

Application Process

Application Process

An organization applying for approval shall submit data documenting its ability to comply with the Criteria for Quality. An Approval Application Form should be filled out and submitted to the National Council. The Form must be accompanied by the review fee in the amount indicated on the Form.

Review Process

Review Process

The National Council will review applications at least four times each year. The deadlines for submitting applications for each phase of the review cycle will be widely announced.

The National Council will review the Approval Application Form and supplemental documentation submitted. The National Council may seek additional detailed information and may survey participants and/or others regarding the organization's offerings.

In applying the Criteria, the National Council will not expect literal conformity in every detail. A balance is sought whereby superiority in certain qualities may compensate, at least in part, for deficiencies in others. Where appropriate, the National Council will also rely to a degree upon the organization's prior experience in continuing education programming; for example, information gathered during the current approval period will be considered when an organization seeks re-evaluation.

The National Council will make its decision on the application and a written report will be made to the applicant. The report will indicate:

- The approval was denied and the causes will be indicated
- Probation Status was awarded and the deficiencies will be indicated
- Approved Status was awarded and exemplary areas as well as areas that need improvement will be indicated.

Upon notification of Approved Status, the organization will remit the annual fee as set by the National Council. Forms for entry into the CLENE Information, Library, and Media System National Continuing Education Registry and the CLENE Directory of Continuing Education Opportunities for Information, Library, Media Personnel will be prepared.

Appeals Procedure

Appeals Procedure

Organizations who are denied Approved Status may appeal the decision. The following steps will be taken:

- The organization notifies the Chair of the National Council in writing that an appeal is being initiated. The grounds of the appeal and the supporting facts should be included. The notice must be received by the Chair within thirty days after the report of the denial was received.
- The Chair will name an Appeals Panel of three persons who are not members of the National Council. The names and addresses of the Appeals Panel will be sent to the organization.
- The Appeals Panel will receive from the National Council copies of all written documentation considered by the National Council as well as the organization's statement on the grounds for the appeal. The Appeals Panel may request additional information or clarification of documents presented.
- The Appeals Panel shall convene. The organization may make an oral presentation with or without legal counsel and/or other experts if it so desires. The Appeals Panel shall consider the information and make its decision. It can (1) affirm the decision of the National Council, or (2) remand the matter back to the National Council for further review and consideration.
- A report of the findings shall be submitted to each member of the National Council and to the organization.
- If remanded to the National Council, the National Council will review the report of the Appeals Panel and reassess its findings. A final report will be issued to the organization.

The organization, in initiating the appeal, agrees to pay all reasonable expenses incurred by the Appeals Panel including but not limited to travel expenses.

Monitoring

Monitoring of Quality Continuing Education

During the term of approval of an organization, the National Council will seek assurance of the maintenance of quality by various means. Organizations are required to submit annual reports designed to give evidence of maintenance of the Criteria for Quality and to provide a record of progress in the development of its educational program. The National Council may survey participants in the organization's programs for additional assurances. The National Council may require additional information concerning the provider and/or its programs at any time.

If during the course of the monitoring, evidence is found to indicate that the organization is no longer adequately meeting the Criteria, the National Council can decide to change the status from Approved to Probation. The organization will be notified in confidence and the deficiencies will be indicated. The organization shall have three months to show why the fact of the probation status should not be made public. This will be accomplished by giving evidence that the necessary changes and improvements are underway. The organization shall have no more than nine months following notification of Probation Status to make the necessary changes and improvements for restoring full Approved Status. Failure to do so will result in the organization being removed from the list of approved providers.

Re-evaluation

Re-evaluation

During the third year of the Approved Status, an organization will be sent an Approval Application Form and invited to re-apply. The Form will be filled out by the organization and submitted with the review fee in the amount indicated on the Form.

The review of the National Council will be based on (1) the information provided on the Approval Application Form and its supplemental documentation and (2) all pertinent information gathered through the monitoring process during the current approval period.

A report of the National Council's decision will be made to the applicant. The Applicant can be re-approved, denied approval, or be awarded Probation Status.

If an organization is placed on probation, the report notifying it of that status is made in confidence. The organization shall have three months to show why the fact of the probation status should not be made public. This will be accomplished by giving evidence that the necessary changes and improvements are underway. The organization shall have no more than nine months following notification of Probation Status to make the necessary changes and improvements for award for full Approved Status. Failure to do so will result in re-approval being denied and the organization will be removed from the list of approved providers.

If an organization is denied re-approval and initiates an appeal of that decision, it will not be removed from the list of approved providers until the Appeals procedures have been completed.

Fees Structure

Fees Structure

The Approval Application Form submitted for consideration for approval or re-approval shall be accompanied by a non-refundable review fee to cover the costs incurred in reviewing the application.

When approval is granted, an annual fee is assessed to cover the administrative costs for operating the system including publication of the calendar (the Continuing Education Communicator) and Directory and interface with the CLENE Information Library, Media System National Continuing Education Registry.

The fee structure will be established and maintained to reflect actual operating costs.

Approval of a Single Offering

Approval of a Single Offering

Many organizations, institutions, and other groups may not wish to apply nor will they be eligible for approval as an organization under Category One. These groups will seek approval for a specific activity or offering they plan to present as opposed to their overall organization and administrative structure. The single activity may be offered once or repeated, unchanged, a number of times. Each separate activity or offering must be approved in its own right.

Types of Activities

Types of Activities

An organization can seek to have a variety of types of continuing education activities approved as a single offering.

Formal information, library, media education organizations can have approved the following:

- Academic course
- Independent study
- Internship or practicum
- Education for an advanced degree.

Any organization can have the following approved:

- Institute
- Workshop
- Seminar
- Short course
- Home Study course
- Mediated learning module
- Programmed instruction module
- Computer assisted instruction program
- Electronically delivered module (e.g., radio, television, satellite, electronic mailbox, teleconferencing).

The organization must demonstrate that it has applied the Criteria for Quality to the institute, workshop, seminar, or short course being approved. For a Home Study course to be approved, it must adhere to these Criteria as well as those identified in the Home Study Council's "Standards for Accrediting Home Study Schools." Approval of any of the remaining types of activities listed above must demonstrate that the "Criteria for Quality Instructional Materials" have been applied along with the general Criteria for Quality.

Terms of Approval Status

Terms

Basis. Approval Status will be awarded for a single offering on the basis of the Criteria for Quality specified in Volume One. The major emphasis will be on the "Criteria for Continuing Education Programs and Activities." The "Criteria for Continuing Education Providers" will be applied only as appropriate for a single offering.

Length. The standard length of approval shall be three years. An approved single offering may be given as a one time presentation or repeated over a period of time or in a number of locations without significant change in format or content.

Types. Approval Status is awarded when the National Council judges the single offering to adequately meet the Criteria for Quality.

Probation Status is awarded to a single offering which had previously been approved but is judged as no longer meeting the Criteria. The organization has a designated period of time (not to exceed nine months) to make the necessary changes and improvements to earn the Approved Status.

Application Process

Application Process

An organization applying for approval of a single offering shall submit data documenting that the offering complies with the Criteria for Quality. An Application for Approval of a Single Offering Form should be filled out and submitted to the National Council. The Form must be accompanied by the review fee in the amount indicated on the Form.

Review Process

Review Process

The National Council will review applications at least four times each year. Deadlines for submitting applications will be widely announced.

The National Council will review the Application for Approval of a Single Offering Form and supplemental documentation submitted. The National Council may seek additional detailed information and may survey participants and/or others regarding the offering.

In applying the Criteria, the National Council will not expect literal conformity in every detail. A balance is sought whereby superiority in certain qualities may compensate, at least in part, for deficiencies in others.

The National Council will make its decision on the application and a written report will be made to the applicant. The report will indicate:

- The approval was denied and the causes will be indicated
- Probation Status was awarded and the deficiencies will be indicated
- Approved Status was awarded and exemplary areas as well as areas needing improvement will be indicated.

Upon notification of Approved Status, the organization will remit the annual fee as set by the National Council. Forms for entry into the CLENE Information, Library, Media System National Continuing Education Registry will be prepared and the offering will be listed in the Continuing Education Communicator (the CLENE Calendar).

Appeals Procedure

Appeals Procedure

If the single offering is not approved, the organization may appeal the decision. The following steps will be taken:

- The organization notifies the Chair of the National Council in writing that an appeal is being initiated. The grounds of the appeal and the supporting facts should be included. The notice must be received by the Chair within thirty days after the report of the denial was received.
- The Chair will name an Appeals Panel of three persons who are not members of the National Council. The names and addresses of the Appeals Panel will be sent to the organization.
- The Appeals Panel will receive from the National Council copies of all written documentation considered by the National Council as well as the organization's statement on the grounds for the appeal. The Appeals Panel may request additional information or clarification of documents presented.
- The Appeals Panel shall convene. The organization may make an oral presentation with or without legal counsel and/or other experts if it so desires. The Appeals Panel shall consider the information and make its decision. It can (1) affirm the decision of the National Council, or (2) remand the matter back to the National Council for further review and consideration
- A report of the findings shall be submitted to each member of the National Council and to the organization.
- If remanded to the National Council, the National Council will review the report of the Appeals Panel and reassess its findings. A final report will be issued to the organization.

The organization, in initiating the appeal, agrees to pay all reasonable expenses incurred by the Appeals Panel including but not limited to travel expenses.

Monitoring

Monitoring of Quality Continuing Education

During the term of approval, the National Council will monitor the maintenance of quality if the offering is repeated more than once. Brief annual reports designed to give evidence of maintenance of the Criteria for Quality are to be submitted. The National Council may survey participants in the offering for additional assurance. The National Council may require additional information concerning the offering at any time.

If during the course of the monitoring, evidence is found to indicate that the offering no longer adequately meets the Criteria, the National Council can decide to change the status from Approved to Probation. The organization will be notified in confidence and the deficiencies will be indicated. The organization shall have three months to show why the fact of the probation status should not be made public. This will be accomplished by giving evidence that the necessary changes and improvements are underway. The organization shall have no more than nine months following notification of Probation Status to make the necessary changes and improvements for restoring full Approved Status. Failure to do so will result in the offering being removed from the calendar as an approved offering.

Re-evaluation

Re-evaluation

During the third year of the Approved Status, an organization will be sent an Application for Approval of a Single Offering Form and invited to re-apply. The Form will be filled out by the organization and submitted with the review fee in the amount indicated on the Form.

If a considerable change in content, format, and/or instruction is made for a repeated single offering during the term of approval, an Application for Approval of a Single Offering Form must be submitted.

If an organization has more than one single offering it wishes to have approved, a separate application for each offering must be submitted or a request for approval as an organization provider may be made.

The review of the National Council will be based on (1) the information provided on the Application for Approval of a Single Offering Form and its supplemental documentation and (2) all pertinent information gathered through the monitoring process during the current approval period.

A report of the National Council's decision will be made to the organization. The organization's offering can be re-approved, denied approval, or be awarded Probation Status.

If the offering is placed on probation, the report notifying the organization of that status is made in confidence. The organization shall have three months to show why the fact of the probation status should not be made public. This will be accomplished by giving evidence that the necessary changes and improvements are underway. The organization shall have no more than nine months following the notification of Probation Status to make the necessary changes and improvements for award for full Approved Status. Failure to do so will result in re-approval being denied and the offering will be removed from the calendar as an approved offering.

If an offering is denied re-approval and the organization initiates an appeal of that decision, the offering will not be removed from the list of approved offerings until the Appeals procedures have been completed.

Fees Structure

Fees Structure

The Application for Approval of a Single Offering Form submitted for consideration for approval or re-approval shall be accompanied by a non-refundable review fee to cover the costs incurred in reviewing the application.

When the approval is granted, an annual fee is assessed to cover the administrative costs for operating the system including publication of the calendar (the Continuing Education Communicator) and interface with the CLENE Information, Library, Media System National Continuing Education Registry.

The fee structure will be established and maintained to reflect actual operating costs.

Approval of Learning Consultants for Individualized Continuing Education Programs

Approval of Learning Consultants

The role of a Learning Consultant is to oversee and guide individuals in preparing and carrying out a learning plan to meet specific needs and objectives. If a person chooses to seek approval as a Learning Consultant, his/her credentials will be reviewed to determine if he/she is capable of overseeing individualized learning activities for compliance with the Criteria for Quality.

Types of Activities

Types of Activities

A Learning Consultant can approve a variety of types of activities when planning a participant's individualized continuing education program.

A person can participate in the following:

- Study groups
- Lecture series
- Journal clubs
- Library personnel interchanges
- Internships

- Institutional visits

A person can also:

- Write a book
- Write a journal article
- Write and give a speech
- Present a program (e.g., conference)
- Teach a course
- Prepare an exhibit
- Consult.

These activities can be approved when part of a plan that applies the "Criteria for Quality for Individualized Programs and Activities".

Terms

Terms of Approval Status

Basis. Approval status will be awarded to a Learning Consultant on the basis of the Criteria for Quality specified in Volume One. The "Criteria for Learning Consultants for Individualized Continuing Education Programs" will be applied to the person in terms of how he/she can design and implement activities to meet the "Criteria for Individualized Programs and Activities".

Length. The standard length of approval shall be three years.

Application Process

Application Process

A person applying for approval shall submit data documenting his/her ability to comply with the Criteria for Quality. A Learning Consultant Approval Application Form should be filled out and submitted to the appropriate State or Multistate Council or to the National Council in the absence of a State or Multistate Council. The Form must be accompanied by a review fee if submitted to the National Council. Each State and Multistate Council will determine if a review fee is to be assessed and, if so, its amount.

Review Process

Review Process

Applications are reviewed by the appropriate council at its next regularly scheduled meeting. A formal report of the Council's decision will be made to the applicant. Those persons awarded Approved Status will be included on a published list of approved Learning Consultants for individualized continuing education programs. An annual fee will be paid (in the case of the National Council) and forms will be completed for entry into the CLENE Information, Library, Media System National Continuing Education Registry.

Appeals Procedures

Appeals Procedures

A request to appeal a decision on an application for a Learning Consultant is submitted in writing to the State, Multistate, or National Council which made the original decision. This Council will initiate the appeals process according to its own appeals procedure. (For details of the appeals procedure of the National Council, see the description under Approval of a Single Offering.

Monitoring

Monitoring of Quality Continuing Education

During the term of approval, the State or Multistate Council (or National Council if it is the approving body) monitors the maintenance of quality by various means. Learning Consultants are required to submit annual reports designed to give evidence of maintenance of the Criteria for Quality. The Council may survey students of the Learning Consultant for additional assurances or request additional information at any time.

Re-evaluation

Re-evaluation

During the third year of the Approved Status, the Learning Consultant will be sent a Learning Consultant Approval Application Form and invited to re-apply. The Form will be filled out by the Learning Consultant and submitted to the appropriate Council along with the review fee, if any.

The review will be based on (1) the information provided on the Learning Consultant Approval Application Form and its supplemental documentation and (2) all pertinent information gathered through the monitoring process during the current approval period.

If a Learning Consultant is denied re-approval and initiates an appeal of that decision, his/her name will not be removed from the list of approved Learning Consultants until the appeals procedures have been completed.

Fees Structure

Fees Structure

Each State and Multistate Council will be responsible for establishing and maintaining its fees structure.

The amount of the non-refundable review fee and annual fee for the National Council will be set and maintained to cover the administrative costs of the system.

SECTION FOUR

GENERAL PROVISIONS OF THE PROVIDER APPROVAL SYSTEM

Being a part of the voluntary Provider Approval System affords the provider with certain benefits and obligates the provider to comply with certain requirements.

Co-Sponsorship

Co-Sponsorship

Co-Sponsors

Co-Sponsors

An approved organization may wish to cooperate with other organizations interested in providing continuing education activities. An approved organization may consider offerings of other groups for co-sponsorship if the following minimal requirements are met. The approved organization must

- Be fully familiar with any program it might co-sponsor
- Actively participate in the planning of the program it co-sponsors
- Ensure that early in the planning the functions of each party are defined
- Assume full responsibility for the quality of the program it co-sponsors by assuring the program complies with the Criteria for Quality Continuing Education
- Have its name placed on the program as a bona fide co-sponsor.

A regional or state chapter of a national association affiliated with an approved organization is not automatically included when the parent organization becomes approved. An approved national association, however, can co-sponsor programs with a local chapter provided it fulfills the responsibilities of an approved co-sponsor.

Involvement of faculty from an approved organization in a continuing education activity does not constitute designation of the activity as approved.

If two or more approved providers act in consort, the responsibility for assurance of compliance with the Criteria is held jointly.

Contracts

Contracts

An approved organization may contract with consultants, teaching staff, facilitators, presentors, etc., to plan, develop, or implement an educational activity. An approved organization or an organization seeking approval for a single offering must assume responsibility for the quality of the activity by ensuring that the contractee complies with the Criteria for Quality Continuing Education.

Conversely, if the contractee is the party that has been approved, the contractee must assume responsibility for the quality of the activity if the intent is to offer the activity as complying with the Criteria for Quality.

The responsibility for compliance can be met by various means such as by planning meetings and joint review of objectives and implementation strategies. A letter of agreement that establishes the terms and conditions for the relationship may be of help. Such a letter could outline the scope of work, special conditions, deadlines, expenses, honorarium, etc.

Calendar

The Calendar

All organizations offering approved program activities and single offerings have the opportunity to list their activities and offerings with special designations in CLENE's Continuing Education Communicator (A Calendar of Continuing Education Offerings) which is published eleven times per year. Each listing will be designated as approved. The organization wishing to be listed will provide information to CLENE, Inc. at the time approval is granted or when a new activity is planned by an approved organization (at least sixty days in advance of the activity).

Directory

The Directory

All organizations offering approved program activities or single offerings have the opportunity to list their activities and offerings with special designations in CLENE's annual Directory of Continuing Education Opportunities for Library, Information, Media Personnel.

Each listing will be designated as approved. At the time of approval, the organization will provide information to CLENE, Inc. for each planned activity or approved single offering. During the subsequent years of the term of approval, the organization will fill out and submit the necessary forms to be included in that year's Directory.

List of Approved Providers

The List of Approved Providers

Annually the National Council will publish the List of Approved Providers, a list of organizations and Learning Consultants that hold Approved Status. The listing will include the name, address, and telephone number of the provider. For organizations, the name of a contact person will be included.

Use of the Designation of Approved Status

The Use of the Designation of Approved Status

An organizational provider, a single offering provider, or a Learning Consultant which has been awarded Approved Status may refer to that Status in any announcements, promotional materials, publications, or other forms of communication or publicity if they so desire. The proper designation for reference to the Approved Status is given in detail for each category.

Organizational Provider

Organizational Provider

An organization whose entire program has been awarded Approved Status by the National Council may use the following statement:

> "[Name of organization] is approved by the National Council on Quality Continuing Education for Information, Library, Media Personnel as a provider for continuing education."

The National Council's official provider logo may also be used in connection with this statement.

Single Offering

Single Continuing Education Program Offering

An organization's single offering which has been awarded Approved Status by the National Council may use the following statement:

> "The [type of offering, e.g., workshop, course, etc.] titled [title of offering] is approved as having met the Criteria for Quality by the National Council on Quality Continuing Education for Information, Library, Media Personnel as a single continuing education program offering."

The National Council's official provider logo may also be used in connection with this statement.

Learning Consultant

Learning Consultant

A Learning Consultant who has been awarded Approved Status by the National Council may use the following statement:

> "[Individual's name] is approved as having met the Criteria for Quality by the National Council on Quality Continuing Education for Information, Library, Media Personnel as a Learning Consultant."

The National Council's official provider logo may also be used in connection with this statement.

State Council Approval

State or Multistate Council Approval

In the event that an organizational provider, a single program offering, or a Learning Consultant is approved by a State or Multistate Council, one of the following forms can be used:

> "[Name of organization] is approved as having met the Criteria for Quality by the State or Multistate Council acting as the officially delegated agent of the National Council on Quality Continuing Education for Information, Library, Media Personnel as a provider of continuing education."
>
> "The [type of offering] titled [title of offering] is approved as having met the Criteria for Quality by the [State or Multistate Council] acting as the officially delegated agent of the National Council on Quality Continuing Education for Information, Library, Media Personnel as a single continuing education program offering."
>
> "[Individual's name] is approved as having met the Criteria for Quality by the [State or Multistate Council] acting as the officially delegated agent of the National Council on Quality Continuing Education for Information, Library, Media Personnel as a Learning Consultant."

The official logo of the National Council may also be used in connection with these statements.

Use of the Contact Hour

Use of the Contact Hour as a Standard Unit of Measure

While planning the educational activity, the organization or Learning Consultant must determine the kind of units to be earned upon successful completion of the activity and the quantity of units, e.g., number of academic credits (semester hours or quarter hours); number of Continuing Education Units (CEU's); or number of contact hours. Ordinarily the following uniform measure should be the base: one contact hour per week times the number of weeks in the term equals one academic credit and ten contact hours equal one CEU. The appropriate number of contact hours must be determined for every activity in order to enter the activity in the CLENE Library, Information, Media System National Continuing Education Registry. Recommended equivalents for converting academic credits, CEU's, and time spent in individualized educational activities are given in Appendix A, "Assignment of Contact Hours for Continuing Education Activities".

Also while planning the activity, the organization (or Learning Consultant) must define the criteria that describes what the participant must accomplish to achieve satisfactory completion and thereby be awarded the credits, CEU's, etc.

When the activity is held, the organization (or Learning Consultant) is responsible for applying the criteria and indicating which participants have satisfactorily completed each continuing education activity. Participants should be provided some form of documentation indicating that they have completed a continuing education activity presented by a National Council-approved provider of continuing education. Completions and credits awarded should be recorded by the provider and maintained for a period of five years.

National Continuing Education Registry

National Continuing Education Registry

The CLENE Library, Information, Media System National Continuing Education Registry is part of the American College Testing (ACT) Program National Registry, a continuing education recordkeeping service for professional associations, institutions, and individual practitioners to meet the need for a central depository of continuing education records.

> The ACT National Registry is designed to allow professional associations to collect and store continuing education data for their members efficiently and economically... The ACT National Registry helps practitioners, i.e., learners, ... professional associations and employers view an individual's continuing education experiences as a whole... In addition, the National Registry serves continuing education by providing summary reports on the nature and extent of continuing education activity for both the individual participant and the professional association.
>
> The Registry is designed to be responsive to the needs of its users; it supports and can help achieve the goal of making records of noncredit education as well as credit continuing education programs easily accessible and readily interpreted by other institutions and organizations. At the same time, it gives the individuals in the system the comfort of knowing that their continuing education records are on permanent file in a central location.[1]

All approved organizations, organizations with an approved single offering, and Learning Consultants must file a sponsor description form for the CLENE National Continuing Education Registry for assignment of a sponsor code, and must file a course description form for each approved offering held which includes the sponsor's course number. The sponsor code and the course number must be printed wherever the statement of approval is used. While providers are strongly urged to participate in all phases of the CLENE National Continuing Education Registry, they are at a minimum urged to submit class lists to the National Council staff and to make available to participants information on the CLENE National Continuing Education Registry.

At the time approval is granted, the organization will fill out the following forms:

- Sponsor Description Form. This will create a record in the sponsor file which will include the sponsor's name and address; the name of a contact person in the organization who will handle Registry liaison; a type of sponsor code; and a unique sponsor code which will identify the sponsor throughout the Registry files. (This code will be assigned by the staff of the National Council.)
- Course Description Form. These forms will create a record for every activity or offering which is approved. The course number, a course description (title and type of credit awarded), type of activity code, and number of contact hours will be entered for each activity, one activity per form.

At the completion of each activity or offering, the participating organization or Learning Consultant will fill out a Class Identification Form and submit it with a Student Data Form for each participant who satisfactorily completed the activity and wishes to enter the Registry. The provider is responsible for distributing the Student Data Forms, for collecting them, and submitting them to the Registry. Whether or not the individual wishes to record his/her participation in the Registry is completely voluntary. A fee of $3.00 per Student Data Form must accompany the forms. The provider may collect the fee from each participant individually or may include this amount as part of the course or activity fee (or tuition).

The Student Data Form includes a section where the participant evaluates the activity. The summary data from the evaluations are sent to the provider as part of the Class Roster which can be used to verify the names of the participants who were entered into the Registry for that particular activity. The evaluation points are:

- Objectives of course or workshop were clear
- Concepts, activities, and materials met the objectives
- Instructor understood thoroughly the material covered
- Instructor's presentation was clear and well organized
- This course or workshop was helpful.

Each participant's file will include a designation that the activity was approved by the National Council or a State/Multistate Council.

A full description of the CLENE Information, Library Media System National Continuing Education Registry is found in the information booklet, CLENE Voluntary Recognition Service, and is available from CLENE, Inc.

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[1] The ACT National Registry: General Information (Iowa City, Iowa: The American College Testing Program, 1979), p. 1.

Reports

Reports

All approved organizations, Learning Consultants, and sponsors of an approved single offering must fill out an annual report and submit it when remitting the annual fee. Annual reports and fees must be filed no later than thirty (30) days following each twelve month period of approval. An organization or Learning Consultant which fails to file its annual report and annual fee by this date may not use the approval statement and logo. The forms for these reports are available from the National Council staff.

Confidentiality

Confidentiality

All information filed with the National Council is confidential and is available only to Council members, Council staff, and members of appeals panels appointed pursuant to the Appeals Process.

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Contact Hour Table

APPENDIX A

ASSIGNMENT OF CONTACT HOURS FOR CONTINUING EDUCATION ACTIVITIES

Type of Activity	Unit of Measure	Contact Hours
a	b	c
Formal Group Activities		
Continuing Education Unit (CEU)	1 unit	10
Academic courses:		
Semester credit	1 unit	15
Trimester credit	1 unit	14
Quarter credit	1 unit	10
Semester audit	1 unit	8
Trimester audit	1 unit	7
Quarter audit	1 unit	5
Institutes	50 minutes	1
Seminars	50 minutes	1
Short courses	50 minutes	1
Workshops	50 minutes	1
Lecture series	50 minutes	1
Formal Individual Activities		
Home Study Programs [*EXAMPLE: If average is 500 minutes 500÷50=10÷2=5 contact hours*]	Average completion time in minutes	1/2 time of Column b
Academic independent study [*EXAMPLE: If average is 800 minutes 800÷50=16÷2=8 contact hours*]	Average completion time in minutes	1/2 time of Column b
Internship, fellowship, or education for advanced degree or Post-Master's Certificate	Academic year of Full time study: Half time study:	 50 25
Audiovisual activities	50 minutes	1
Informal Group Activities		
Journal clubs (with written summary of sessions)	50 minutes	1
Study groups (with written summary of sessions)	50 minutes	1
Library/information/media association meetings (with written summary)	50 minutes	1
Lecture series (with written summary)	50 minutes	1
Self-Learning		
Use of non-supervised audiovisual devices	50 minutes	1
Educational television without local supervision	50 minutes	1
Use of programmed educational materials such as teaching machines	50 minutes	1
Consultation		
[No more than 2 contact hours can be claimed regardless of length]	100 minutes	2

APPENDIX A (CONTINUATION)

Type of Activity a	Unit of Measure b	Contact Hours c
Self-Assessment Activities		
[Time spent in taking self-assessment tests and audits; activities taken as result of self-assessment programs should be claimed in appropriate category]	50 minutes	1
Publications		
Articles in recognized journals:		
Research		
Single author	1	10
Senior author	1	8
Co-author	1	5
Information sharing	1	1
Technical reports		
Single author	1	10
Co-author	1	5
Books		
Whole		
Single author	1	40
Co-author	1	20
Chapter	1	10
Book reviews in recognized journals (critique)	1	1
Presentations and Exhibits		
To professional audiences (only first time given) Includes audiovisual presentations	1	10
Teaching		
Courses, workshops, seminars, etc., given first time [*For example, if course has 8 contact hours, teacher could receive 16 hours for preparation + 8 hours for presentation= 24 contact hours*]	50 minute presentation + 2 x for preparation	3
Participation in Association Activities		
National officer/director/committee chairperson	1 year of service	10
National committee member	1 year of service	5
National delegate	1 year of service	2
State officer, committee chairperson or journal editor	1 year of service	5
Regional or local officer/committee chairperson	1 year of service	3
Member state, regional/local committee	1 year of service	2
Conference attendance (if submitted with written summary)	50 minutes	1
Other Learning Experiences	To be determined	

APPENDIX G

A PROGRAM FOR QUALITY IN CONTINUING EDUCATION FOR INFORMATION, LIBRARY, AND MEDIA PERSONNEL: POLICY STATEMENT, CRITERIA FOR QUALITY AND PROVIDER APPROVAL SYSTEM

FACT SHEET

A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System

Background

The Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality and Provider Approval System was designed as a research and development project at the Department of Library and Information Science, The Catholic University of America in conjunction with CLENE (The Continuing Library Education Network and Exchange), Inc. and was funded by the Department of Education, Office of Libraries and Learning Technologies under Title II-B of the Higher Education Act. The project was accomplished by a seven member council made up of persons with continuing education expertise, a project staff, and a project evaluator. Drafts of the program were written and distributed to the information, library, media community for review and reactions; an open hearing was held to answer questions and receive comments; and a pilot survey was performed to test the approach and procedures. The purpose of the project and the Program is to upgrade the quality of continuing eduction activities and to institute a form of accountability to assure the quality. The Criteria for Quality is the first step and the Provider Approval System is the second step.

Policy Statement

Continuing education is defined as "a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with information, library, media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn." The scope of the Program covers (1) all persons who work in or with information, library, and media services, including those involved in governance, management, operations, delivery of services, and public relations,(2) a wide variety of learning opportunities, including both formal and informal learning activities which exist independently or under the guidance and sponsorship of various institutions, associations, and other organiziations, and (3) subject areas broadly defined as appropriate, including all related disciplines that help participants to practice with competence in their present or future environment.

Criteria for Quality

Quality continuing education offerings must be based on careful planning. The Criteria for Quality incorporate a number of factors that can be used in assessing the planning, design, delivery,and evaluation of a continuing education offering. There are criteria for specific types of continuing education programs and activities, e.g., group programs and activities such as academic courses, institutes, workshops, seminars, and short courses; individualized programs and activities; and instructional materials such as teaching aids, mediated delivered programs, and self-instructional materials. There are also criteria for types of continuing education providers, specifically those who provide activities for groups and those who serve as Learning Consultants on a one-for-one basis. Each criterion is accompanied by assessment factors which illustrate the scope of the criterion and suggest the level or degree to which each should be applied.

Provider Approval System

The purpose of the Provider Approval System is to identify continuing education activities that should have an acceptable level of quality. The basis is the Criteria for Quality which are used in a review and approval process to measure and predict quality in the offerings. The Provider Approval System is administered by a Council made up of members of the information, library, media community with expertise in continuing education program planning and development. Providers of continuing education activities apply for approval by submitting information and documentation about their program or activities that illustrate that these activities meet the Criteria for Quality. The Council reviews the application decides whether the Criteria have been met at an acceptable level and if so, awards "Approved Status" for the program or activity. There are three categories of approval.

1. Single Offering. A provider may apply for approval of a specific single offering or activity.
2. Organizational. A provider may apply for approval of all the activities and offerings in its entire continuing education program. Emphasis in this type of approval is on the provider's administrative structure and resources in order to determine its capability and willingness to apply the Criteria to each of its offerings.
3. Learning Consultant. A person may apply for approval to work as a Learning Consultant with individuals in one-to-one independent learning activities.

State/Multistate Councils

One of the feautres of the design of the Provider Approval System is a bi-level approach to approval as opposed to centering all approval authority in a national group. Besides the National Council, it is advocated that states or multistate regions form councils to be an integral component in the coordinated national Provider Approval System. The State or Multistate Council will apply to the National Council for approval to serve as a delegate of the National Council to review and approve within its geographic area (1) single offerings, (2) Learning Consultants, and (3) local organizations and agencies that have a continuing education program. Approval by a State or Multistate Council will give esentially the same status to an educational program, organization, single offering, or Learning Consultant as would approval by the National Council, that is, it will be considered to be fully approved based on the Criteria for Quality.

CLENE Voluntary Recognition Service

The Program for Quality in Continuing Education for Information, Library, and Media Personnel is one component of the CLENE Voluntary Recognition Service which has a two-fold purpose: to provider a mechanism for recognizing educational attainment and to build a system for encouraging better quality continuing education activities. The other components are the CLENE Information, Library, Media System National Continuing Education Registry (a national recordkeeping mechanism for an individual's participation in continuing education activities); the CLENE Statement of Acknowledgement for Continuing Education (for participation in continuing education at a specified level expressed in number of contact hours); and a veriety of support services offered by CLENE, Inc. for both the individual participant and for the providers of continuing education. The entire recognition service is voluntary for both the individual participants and the providers. Providers are urged but not required to apply for approval. Individuals choose whether or not to enter their activities in the recordkeeping system; they decide when to have a transcript of their activities generated and decide who is to receive the transcript; and they decide whether or not to apply for a Statement of Acknowledgement for Continuing Education.

Publications

"A Program for Quality in Continuing Education"
  Volume 1. Policy Statement and Criteria for Quality
  Volume 2. Provider Approval System
"Suggested Guidelines for State or Multistate Council Formation; Approval of Programs in Continuing Library, Information, Media Education"

For Information Contact:

National Council on Quality Continuing Education
c/o CLENE, Inc.
620 Michigan Avenue, N.E.
Washington, D.C. 20064

APPENDIX H

SUGGESTED GUIDELINES FOR STATE OR MULTISTATE COUNCIL FORMATION: APPROVAL OF PROGRAMS IN CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

SUGGESTED GUIDELINES FOR STATE OR MULTISTATE COUNCIL FORMATION; APPROVAL OF PROGRAMS IN CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

Prepared by

The Project Staff of

The National Council on Quality Continuing Education for Information, Library, Media Personnel

1980

SUGGESTED GUIDELINES FOR STATE OR MULTISTATE COUNCIL FORMATION;
APPROVAL OF PROGRAMS IN CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

The purpose of these guidelines is to help establish State or Multistate Councils of Quality Continuing Library Education and their programs of review for approval in continuing information, library, media education.

THE DEVELOPMENT OF AN APPROVAL SYSTEM IN CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

There has been a growing awareness over the past several years of the need to encourage quality in continuing education programs. In response to this need from the field, the Continuing Library Education Network and Exchange (CLENE), Inc. has adopted as a top priority for its efforts, the development of a voluntary recognition service for providers of quality programs and for those who participate in continuing education activities.

Voluntary Recognition Service

The concept of a voluntary recognition service includes Criteria for Quality for Continuing Education activities; the means to apply the Criteria and approve activities as meeting the Criteria for Quality; a recordkeeping system for each individual's efforts; recognition both to the continuing education providers who meet the Criteria for Quality and to the individuals who regularly participate in continuing education activities; and support activities to further advance the cause of quality continuing education through such activities as consulting, training, publications, and a clearinghouse.

In order to proceed in the area of Criteria for Quality for Continuing Education activities, CLENE submitted a proposal to the Office of Education and received a Title II-B Higher Education Act grant for a project from July 1, 1979 to June 30, 1980 to develop and demonstrate Criteria for Quality and a Provider Approval System. This project entailed:

1. Forming a seven member Council on Quality Continuing Library Education: Information--Library--Media Programs
2. Developing a policy statement on continuing education which includes its definition, objectives, and rationale
3. Developing Criteria for Quality for Continuing Education activities
4. Developing guidelines for applying the Criteria for Quality in order to evaluate and approve programs of the providers of continuing education

5. Conducting pilot surveys of selected providers of continuing education to test the Criteria for Quality as the basis for evaluating and approving programs.

The work of the project is best presented in the document "A Program for Quality in Continuing Education for Information, Library, Media Personnel: Policy Statement, Criteria for Quality, and Provider Approval System."

Provider Approval System

The method chosen for applying the Criteria for Quality to continuing education activities was a Provider Approval System. Providers of continuing education activities apply for approval to a council made up of members of the information, library, media community with expertise in continuing education program planning and development. The providers submit information and documentation about their program or activities that illustrate that these activities meet the Criteria for Quality. The Council reviews the application and decides whether the Criteria have been met and if so, awards Approved Status for that program or activity.

There are three categories of approval.

1. Single Offering. A provider may apply for approval for a specific single offering or activity.
2. Organizational. A provider may apply for approval of all the activities and offerings in its entire continuing education program.
3. Learning Consultant. A person may apply for approval to work as a Learning Consultant with individuals in one-to-one independent learning activities.

State Council

One of the features of the design of the Provider Approval System is a bi-level approach to approval as opposed to centering all approval authority in a national group. The National Council on Quality Continuing Education for Information, Library, Media Personnel encourages states or multistate regions to form councils to be an integral component in the coordinated national Provider Approval System. As described in Volume Two of the Program document (Section Two, Role of National and State Councils of the Provider Approval System), the State or Multistate Council will apply to the National Council for approval to serve as a delegate of the National Council to review and approve (1) single offerings, (2) Learning Consultants, and (3) local organizations and agencies that have a continuing education program.

The bi-level approach enables a local area to incorporate into its criteria any requirements peculiar to that state or region, e.g., to accommodate certification or recertification requirements. It spreads the volume of work involved in review and approval over a wider area but allows consistency and evenness among the various approving bodies. It allows for closer contact between the sponsor/providers and the approving body which will expedite communications and monitoring.

Approval by a State or Multistate Council will give essentially the same status to an educational program or organization as would approval by the National Council on Quality Continuing Education. This means that local organizations or agencies, approved by a State or Multistate Council which has been approved by the National Council, wil be considered to be fully approved based on the Criteria for Quality and will be included in any lists or publications of approved continuing education providers. Their offerings will also be identified as approved in the CLENE National Continuing Education Registry.

Purpose of the State Council

A State or Multistate Council for Quality Continuing Education is responsible for granting

- Approval of a single offering
- Approval of Learning Consultants for individualized learning
- Provider approval of local organizations and agencies

Approval of single offerings by the State or Multistate Council encompasses those program offerings by an organization or agency not having provider approval from the National, State, or Multistate Council.

The primary focus of provider approval by the State or Multistate Council is upon the following institutions and organizations:

- Individual libraries or library systems, single type or multitype
- Information, library, media organizations which do not have statewide scope, e.g., county or city library associations
- Multicounty or local units or statewide organizations whose continuing education activities are not under administration of the statewide organization.

Provider approval of statewide information, library, media associations or organizations and library education programs is the responsibility of the National Council on Quality Continuing Education.

THE GUIDELINES

It is hoped that these suggested guidelines will aid any state that so wishes, through a State Council, a Multistate Council, or the state library agency, in establishing criteria which will assist those individuals responsible for planning programs in libraries or other local organizations to improve their educational value as well as to develop a system within the state or region by which continuing education resources may be evaluated. In this way it is believed that groups within a state can individually offer programs that can be approved and which will result in improvement of the quality of continuing education for the practitioners in their own communities. The ultimate benefit is intended to be the improved quality of information, library, media service to the public.

These suggested guidelines are not intended to serve as a text or restrictive advisory document, but rather to provide a checklist to guide the planning process. The steps are to serve as prompts to lead the planners to focus on decision-points and to consider a range of options for each. The process should encourage diversity of approach and experimentation in continuing education at the grassroots level.

Suggested Procedure for Planning a Provider Approval System at the State or Multistate Level

The initial impetus for forming a state or multistate[1] council may come from a single source (i.e., person or organization) or from a group (e.g., an ad hoc committee, an existing state continuing education committee, or a state library continuing education committee). The common approach is to form a committee or task force to organize the council. This group does not automatically become the council itself, but in some cases it could so evolve. This planning document is based on the premise that a planning committee will be formed and will plan for and establish a council.

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[1] The same general objectives, concepts, and practices used by a State Council on Quality Continuing Education can be applied where states have joined together to form Multistate Councils. Therefore, in the text whenever State Council is used, Multistate Council is also applicable and the "Multistate" has not been repeated in each instance.

STEPS	ACTIONS/DECISIONS	COMMENTS
1. Study the document "A Program for Quality in Continuing Education for Information, Library, Media Personnel: Policy Statement, Criteria for Quality, and Provider Approval System."		Describes the national Provider Approval System within which the State Council is to operate. Lists the Criteria for Quality on which all approval programs should be based, if not precisely, at least in its essence.
2. Identify the constituents of the continuing education activities in the state.	List of institutions, organizations, and groups which plan or conduct continuing education activities. Consider the following: • professional associations --state chapters --local chapters --state/local associations • networks and consortia • libraries and library systems • information, library, media education programs --graduate-level --Bachelors-level --Associate-level --extension • state government agencies • other continuing education groups	This list will represent the potential "clients" of the Provider Approval System
	List of individuals interested in planning or producing continuing education activities. Should include: • persons knowledgeable about adult education • persons knowledgeable about educational technology • representatives of other professions which have continuing education recognition systems	Such individuals could be interested in becoming Learning Consultants and/or willing to serve as resource persons in the support of provider groups.
	Representative list of continuing education participants, employers, and users of information, library, media services. Consider the following: • a user of services • a potential user of services • a library, information, media student • an employer of library, information, media personnel • a member of a governing board of a library • a practitioner who is working part-time • an inactive professional who plans to return to work	Such persons can be used as advisors to the State Council.

STEPS	ACTIONS/DECISIONS	COMMENTS
3. Design the composition of the Council	Determine the number of Council members	
	Determine the make-up of the Council. Council membership should reflect the broadest possible range of the constituents. Categories of representatives can include: • Types of libraries --public libraries --academic libraries --school libraries --special libraries --media centers --information centers • Types of library education programs --graduate-level --Bachelors-level --Associate -level • Types of staff --clerical --technician --paraprofessional --professional --administrator • Geographic areas --counties --regions of the state --districts of the state • Specific organizations Are there any automatic members and if so, are they ex officio	It may be desirable to draw up a profile that defines the attributes that the Council as a whole should have and use this as a selection guide.
	Determine the qualifications of the Council members, such as • experience and interest in continuing education • knowledge of the concepts of adult learning	
	Determine the term of membership • length of the term • are the terms staggered and if so, how • are consecutive terms allowed and if so, how many	
	Determine the selection process • are members named and if so, by whom • are members elected and if so, by whom • what is the nominating procedure --open solicitations --nominating committee --named candidates from specific groups	

STEPS	ACTIONS/DECISIONS	COMMENTS
4. Develop the Council's charge and scope of effort	Determine if the Council will: • handle the State certification process, if any • handle the State recertification process, if any • award CEU's for other groups • maintain a recordkeeping system	It is strongly urged that the CLENE National Continuing Education Registry be utilized by the State Council
	• put on training workshops • provide consultants to providers • promote continuing education statewide • perform statewide needs assessments • perform statewide planning • publish resource material • publish a calendar of events • serve as an information clearinghouse	
	Define the Provider Approval System • What constituents, if any, will not be served • What categories of approval will be used --approval of an organization as a provider --approval of a single offering of a provider --approval of a Learning Consultant	The first three are the same as in the National Provider Approval System and are recommended as the minimum for a State Council to perform.
	--approval of a training consultant --approval of a presentor --approval of a resource person	
5. Develop the Criteria for Quality		The National Council's Criteria for Quality should be the basis for the State Council's Criteria
	Prepare the Criteria • List any criteria that are omitted from the National Criteria for Quality • List any criteria that are added to those present in the National Criteria for Quality	Local needs may stem from such areas as certification requirements, recertification requirements, or state civil service position descriptions.
	Prepare the Assessment Factors for each Criterion • List any assessment factors that are omitted from the National Criteria for Quality • List any assessment factors that are added to those present in the National Criteria for Quality	

STEPS	ACTIONS/DECISIONS	COMMENTS
	• Determine if quantitative levels or measures are to be included as assessment factors	
6. Design the administrative and governance structure of the Council	Determine if the Council will be: • an independent, autonomous entity • sponsored by a group or organization • a component of a parent group or organization Determine authority, responsibility, and accountability for such areas as: • finances (income and expenditures) • policy formation • operational administration Will there be an advisory committee, if so • What is its role • What is its make-up • How will be function Will there be an Executive Staff, if so • What positions • How many • What functions will be performed Will there be officers for the Council, if so • What offices • What are the functions for each • How are they chosen	
7. Design the Approval Procedures	Determine the length of approval for each category of approval, such as: • one year • two years • three years Determine the Types of Status to be awarded and the conditions for each, such as: • provisional (preliminary) • approved • probation • conditional • disapproved	Based on the scope of effort defined in Step 4.

STEPS	ACTIONS/DECISIONS	COMMENTS

Develop the review mechanism. Consider the following:

- site survey team
- individual visit
- written application form with documentation
- observor/monitor

Write up the procedures to be used by the Council to review and evaluate providers being considered for approval.

- Will the Council
  --meet in person
  --discuss and vote on a conference call
  --submit their vote via the mail
  --members review all of the applications
  --use a screening committee to review applications prior to a Council decision
- How often will the Council review applications--how many times per year
- Will a rating scale be used to evaluate the applicants, if so, what will it be
- Will standard replies or form letters be used to communicate with the applicants
- What fees will be assessed if any, such as
  --review or application fee
  —administration fee
  --renewal fee

This relates to the budget in Step 9

Write up the procedures to be used by a provider to apply and be considered for approval.

- Describe the steps in the cycle
- Develop the forms, if any
- Develop the guidelines or instructions for the forms
- Describe the fees, the deadlines, and the means of communication
- Describe the method of deliberations to be used and the particulars of the rating system, if any

Determine the appeals process

- Will the Council
  --hear the appeal
  --appoint an outside committee
  --refer the matter to a "higher authority" within its parent organization

STEPS	ACTIONS/DECISIONS	COMMENTS
	• Will the appellant --prepare written material --appear in person • How will expenses for the appeal process be handled Design the monitoring mechanism for approved providers, offerings, and Learning Consultants. Consider the following: • annual reports • observors • surveys of participants • evaluative questionnaires • evaluation results from the CLENE National Continuing Education Registry Will the techniques be systematic and regularly scheduled or on a random basis Determine the procedure for Reapproval. Consider the following: • time schedule--how far in advance of the end of the approval period • Council initiated or provider initiated • review technique--same as initial approval or different and how • fees, if any • use of additional information gathered through monitoring	
8. Determine the range of the support services to be offered by the Council	Consider the following: • Publications --Announcement publications such as * a calendar * a directory of approved offerings --Resource materials such as * bibliographies * concept papers * instruction booklets * sample tests, instruments, and forms --Informational publications such as * a newletter * a journal • Training courses for continuing education providers such as institutes, workshops, seminars, etc. • Consultants for providers to aid in planning or to remedy areas of weakness discovered in the application/review process • Information clearinghouse on continuing education areas such as	A Provider Approval System must be supported by additional services in order for it to be successful.

STEPS	ACTIONS/DECISIONS	COMMENTS
	--resource persons --presentors by subject area --offerings scheduled within the state • Promotion policy and techniques --brochures, flyers, and announcements --advertisements --press releases --articles in periodicals, special columns in journals, etc. --speakers bureau	
9. Develop two budgets	Determine the overall budget rationale. • Will the Council be self-sustaining from fees. • Will there be contributions and/or appropriations from interested groups or agencies • Will overhead items be absorbed by parent group(s) • Will all work be done on --a volunteer basis --a reimbursement for expenses basis --a fixed fee basis	Once the full program has been designed, a budget can be prepared.
	Develop the Initial Budget which includes the start-up costs. Consider the following: • Facilities --Office rental and utilities --Furniture * desks * chairs * file cabinets --Equipment * typewriters * adding machine	With a self-sustaining Council, the start-up period may require an initial sum as seed money which can be paid back over the course of the first several years.
	• Staff and Council Members --Salaries --Honoraria --Expenses (i.e., travel)	
	• Printing and Reproduction --Forms --Materials (e.g., brochures) --Correspondence • Postage • Telephone --Long distance calls --Regular service --Conference calls	Initial costs will be higher than on-going costs.

STEPS	ACTIONS/DECISIONS	COMMENTS
	• Office supplies	
	Develop the On-going Budget which includes the operational costs. Consider the following: • Office rental • Staff and Council Members --salaries --expenses --honoraria • Printing and reproduction • Postage • Telephone • Office supplies	This could be the budget starting with the second or third year depending on how long the start-up period will be. The budget may vary depending on the volume of work. Different versions based on different numbers of providers could be developed.
	Determine the fee structure if fees are to be charged. Consider the following: • Number of years start-up costs are to be amortized over • Overhead costs and services that are absorbed or donated	Even if costs are not charged, the amounts involved should be known.
10. Plan the interface with the CLENE National Continuing Education Registry and the CLENE Statement of Acknowledgement for Continuing Education	Consider the following: • Distribute forms and instructions for providers and individuals who wish to participate in the CLENE National Continuing Education Registry • Provide training in the use of the CLENE National Continuing Education Registry	The State Council should advocate the use of the CLENE National Continuing Education Registry by its approved providers.
	The State Council will • Assign a person to serve as the Registry Officer • Fill out the Sponsor Description Form and have a Sponsor Code assigned • Fill out Course Forms for each offering or activity it sponsors • Distribute Student Data Forms to the participants at the activity • Gather the completed Student Data Forms and the $3 fee and transmit them to the Registry office along with a Class Identification Form	If the State Council offers training or other continuing education activities, it should become a participant in the CLENE National Continuing Education Registry
	Consider the following: • Distribute forms and instructions for participants who wish to earn a Statement of Acknowledgement for Continuing Education from CLENE	The State Council should support participants who seek to earn a Statement of Acknowledgement for Continuing Education

STEPS	ACTIONS/DECISIONS	COMMENTS
	• Recognize recipients of the Statement of Acknowledgement who reside within the state by announcements in informational publications	
11. Devise an implementation strategy and plan for the State Council	Develop an implementation plan for the State Council and the State Provider Approval System. Consider the following: • A phased development • A pilot project Determine the time line with milestones for each major task and/or decision. Assign responsibilities for specific tasks and decisions Assign a person to be project manager to oversee the implementation plan	
12. Apply to the National Council on Quality Continuing Education for Information, Library, Media Personnel for Approved Status	Complete and submit the Approval of a State/Multistate Council Form	

APPENDIX I

CLENE VOLUNTARY RECOGNITION SERVICE

CLENE VOLUNTARY RECOGNITION SERVICE

Introduction

In recent years there has been an increased interest in continuing education among members of the information, library, media community. As a result of the rapid changes in technology and the varied pressures put on administrators, people sought means to keep up with these new developments and looked to continuing education activities. The quality and effectiveness of these activities were very uneven. Some were over-priced, wastes of time and efforts, while others were top-notch offerings. There was a call from the profession for something to be done to upgrade the quality of the continuing education offerings and to institute a means for a person to identify quality programs before the fact.

Also, the increased participation in continuing education activities left people with a drawer full of letters of completion, CEU certificates, and cancelled checks to document their efforts. And there was no measure to indicate if the amount of their completed activities was average or significant in terms of what their fellow workers were accomplishing.

This, then was the environment in which the CLENE Voluntary Recognition Service was created. CLENE Inc., as the national organization with its chief mission being the advancement of continuing education for all information, library, media personnel, was the natural parent for this service. A research project was funded and a model for a voluntary recognition service was designed. A national conclave was held to review the model and provide opinions and comments from the field. A task force was formed within CLENE to coordinate the development of the service. A second research project was funded and a contract was negotiated with a national support organization. The service was then in place.

What is the Voluntary Recognition Service?

The scope of the voluntary recognition service is two-fold: it provides a mechanism for recognizing educational attainment and builds a system for encouraging better quality continuing education activities. There are five areas that are implemented as four separate components.

The five areas are:

1. Criteria for Quality continuing education
2. A system for the approval of providers of continuing education who effectively apply the Criteria

3. A national recordkeeping mechanism for an individual's participation in continuing education activities
4. A Statement of Acknowledgement of participation in continuing education at a specified level expressed in number of contact hours
5. Support services for the individual participant and for the providers of continuing education.

The four components of the CLENE Voluntary Recognition Service are:

1. The CLENE Provider Approval System
2. The CLENE Information, Library, Media System National Continuing Education Registry.
3. The Statement of Acknowledgement for Continuing Education
4. Support services provided by CLENE, Inc.

The entire recognition service is voluntary for both the individual participants and the providers. Providers are urged but not required to apply for approval. Individuals choose whether or not to enter their activities in the recordkeeping system; they decide when to have a transcript of their activities generated and decide who is to receive the transcript; and they deicde whether or not to apply for a Statement of Acknowledgcment for Continuing Education.

The Provider Approval System

The purpose of the Provider Approval System is to identify continuing education activities that should have an acceptable level of quality. The basis is the Criteria for Quality which are used in a review and approval process to measure and predict quality in the offerings.

Quality continuing education offerings must be based on careful planning. The Criteria for Quality incorporate a number of factors that can be used in assessing the planning, design, delivery, and evaluation of a continuing education offering. There are criteria for specific types of continuing education programs and activites, e.g., group programs and activities; individualized programs and activities; and instructional materials. There are also criteria for types of continuing education providers, specifically those who provide activities for groups and those who serve as Learning Consultants on a one-for-one basis.

Each criterion is accompanied by assessment factors which illustrate the scope of the criterion and suggest the level or degree to which each should be applied.

EXAMPLE:

CRITERION 1 for Group Programs and Activities: *The specific needs of the client group have been assessed.*

Assessment Factors:

1. Has the target group been clearly identified?

2. Has a systematic needs assessment been conducted?
3. Have representatives of the target group participated actively in the needs assessment process?

The Provider Approval System is administered by a Council made up of members of the information, library, media community with expertise in continuing education program planning and development. Providerw of continuing education activities apply for approval by submitting information and documentation about their program or activities that illustrate that these activities meet the Criteria for Quality. The Council reviews the application and decides whether the Criteria have been met at an accepted level and. if so, awards "Approved Status" for that program or activity.

There are three categories of approval.

1. Single Offering. A provider may apply for approval of a specific single offering or activity.
2. Organizational. A provider may apply for approval of all the activities and offerings in its entire continuing education program. Emphasis in this type of approval is on the provider's administrative structure and resources in order to determine its capability and willingness to apply the Criteria to each of its offerings.
3. Learning Consultant. A person may apply for approval to work as a Learning Consultant with individuals in one-to-one independent learning activities.

The system calls for bi-level approach to approval as opposed to centering all approval authority in the national group. Besides the National Council on Quality Continuing Education, it is strongly urged that states or multistate regions form councils to be an integral component in the coordinated national Provider Approval System. The State or Multistate Council will apply to the National Council for approval to serve as a delegate of the National Council to review and approve (1) single offerings in that geographic area; (2) Learning Consultants in that geographic area, and (3) organizational applications from local organizations and agencies.

The bi-level approach enables a local area to incorporate into its criteria any requirements peculiar to that state or region, e.g., to accommodate certification or recertification requirements. It spreads the volume of work involved in review and approval over a wider area but allows consistency and evenness among the various approving beodies. It allows for closer contact between the providers and the approving body which will expedite communications and monitoring. In states or regions without a council, all approval will be handled by the National Council.

Approved single offerings or offering from approved organizational providers and Learning Consultants will be identified with a statement of approval and/or the Voluntary Recognition Service logo. This should be an aid to persons reviewing what is available in continuing education activities and deciding which activities in which to participate.

The CLENE National Continuing Education Registry

Throughout the entire design phase of the Voluntary Recognition Service, attention was given to the systems and procedures of other professions such as the systems operated by the American Medical Association, the American Psychological Association, and the American Institute of Certified Public Accountants. It was learned that a recordkeeping system for continuing education participants at a national level had been developed and was available on a service fee basis.

The American College Testing (ACT) Program National Registry is a continuing education recordkeeping service for professional associations, institutions, and individual practitioners which meets the need for a central, computer-based, depository of continuing education records. CLENE Inc, has signed a contract with ACT and the CLENE National Continuing Education Registry is part of the ACT National Registry.

The basic purpose of the Registry is to maintain an orderly national record of a person's learning activities in which he/she has participated. It is similar to the service provided by a college or university registrar's office which maintains files and issues transcripts.

Participation in the CLENE National Continuing Education Registry is completely voluntary. Each person decides whether or not to enter a record of his/her participation in an activity or offering. A student data form is filled out for each activity and fee of $3.00 is paid to enter a record. Providers of continuing education activities are urged to cooperate with the National Registry and coordinate the filling out of the forms, the collection of the fees, and the transmitting of the forms to the Registry office; however, the individual participant can enter a record of their activities whether or not the provider performs this service. Independent, nontraditional activities can also be entered by an individual learner if he/she so desires, such as writing a journal article, consulting, teaching a course, preparing an A-V presentation, or presenting a paper at a conference.

The basic record in the Registry is comprised of the following information:

--name of the sponsor/provider

--course/activity title

--course number

--brief course/activity description

--whether the course/activity awarded academic credit or CEU's and how many

--type of course/activity

--subject area expressed by a HEGIS code

--whether the course/activity was approved or not and if so, by a state or the National Council or by an outside profession

--number of contract hours earned

--student's name and address

--student's birth date

--student's identification number

If a person wishes to have a transcript of his/her recorded activities, a transcript request form is sent to the Registry office with a fee of $6.00. Only the person can request his/her transcript be printed. The Registry will send the transcript to whomever the person specifies.

Providers get class rosters and reports of student evaluations for each offering or activity. CLENE gets annual statistical reports that give summary totals on continuing education participation nation-wide which will serve as an excellent planning and research resource.

The Statement of Acknowledgement for Continuing Education

As is true with other professions, CLENE will offer for the information, library, media profession a Statement of Acknowledgement for Continuing Education. Whether or not a person wishes to apply for a Statement of Acknowledgement is strictly a personal decision and is entirely voluntary.

The Statement of Acknowledgement recognizes that a person has participated in a minimum of 120 contact hours of continuing education activites during a three year period. There are seven categories of continuing education activities that are applied to the 120 hour total with certain categories required at a minimum level and others limited at a certain level. This is to assure that the Statement represents broad, balanced participation by the person.

The categories and their limits are described in the table on the next page.

The person fills out an application, which breaks down the activities by category; requests a National Registry transcript be sent to the CLENE office; and remits a fee if a nonmember of CLENE. After the application is processed and verified, a Statement of Acknowledgement for Continuing Education is issued to the person.

The next three year cycle begins as of the date of the application and any activities undertaken after that day apply to the next Statement but no activities prior to that date can be carried over and applied. The three year cycle is the greatest time period. If 120 contact hours are earned in the proper categories in less than three

Categories for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

Category	Description	Contact Hour Limit
1.	All activities "approved" by the National Council on Quality Continuing Education or approved State or Multistate Councils of Continuing Education. This includes approval of an organization for its total program, approval of a single offering, and programs planned in concert with an approved Learning Consultant. Important note: For the calendar year 1980 and before, activities that were awarded academic credit or Continuing Education Units (CEU's) may be entered into this category.	No Limit (40 contact hour minimum)
2.	Academic credits and CEU activities with Non-Approved Sponsorship.	40 hours
3.	Informal Group Activities, e.g. association programs, journal clubs, and lecture series.	30 hours
4.	Informal Individual Activities (15 contact hour limit in each subcategory): - A-V kits - modules on interactive technologies - programmed instruction - personal reading - newspaper courses - self-assessment - tutorial/consultation - home study or correspondence courses - independent study	30 hours
5.	Papers, Publications, Books, Exhibits, Consulting, Teaching	40 hours
6.	Association Activities, i.e., holding an elected office or serving as a committee chairperson.	20 hours
7.	Other Meritorious Learning Experiences	30 hours

years, the person can apply as soon as that total is reached. There is no limit on the number of Statements one can earn.

Support Services

To further the concept of the Voluntary Recognition System and supplement the major components, it requires certain support services, which will be provided by CLENE itself.

The CLENE concept paper series is an example of CLENE's existing service as are the CLENE resource packages, "CER Packages".

The CLENE announcement publications (the Annual Directory of Continuing Education Opportunities, the Continuing Education Communicator, and the CLENExchange) will have a special symbol to designate those offerings and providers who have "Approved Status".

CLENE assemblies and workshops will be given in relevant areas such as needs assessment, competency testing, etc.

The CLENE Task Force on Recognition Systems will continue to advise and coordinate the various components and will be responsible for promotion of and education for the Voluntary Recognition Service.

Summary

In summary, the major attributes of the CLENE Voluntary Recognition Service as a whole are:

- The voluntary Recognition Service is for everyone who works in or with information, library, media services.
- The Service is voluntary.
- The Voluntary Recognition Service is not limited to members of CLENE.
- The Criteria for Quality can be used to plan continuing education activities and offerings whether approval is sought or not.
- The Criteria for Quality can be used by an individual as a guideline to assess the quality of activities which he/she may wish to select for participation.
- The national components of the Voluntary Recognition Service will seek to be compatible with other related programs at the state and national level.

APPENDIX J

CLENE VOLUNTARY RECOGNITION SERVICE

INFORMATION BOOKLET

CLENE, INC.

CONTINUING LIBRARY EDUCATION NETWORK AND EXCHANGE

620 Michigan Avenue, N.E.
Washington, D.C. 20064
(202) 635-5825

The basic missions of CLENE are: (1) to provide equal access to continuing education opportunities, available in sufficient quantity and quality over a substantial period of time to ensure library and information science personnel and organizations the competency to deliver quality library and information services to all; (2) to create an awareness and a sense of need for continuing education of library personnel on the part of employers and individuals as a means of responding to societal and technological change.

CLENE

VOLUNTARY RECOGNITION SERVICE

FOR PARTICIPATION IN CONTINUING

INFORMATION, LIBRARY, MEDIA

EDUCATION:

RECORD KEEPING SERVICE

AND

ACKNOWLEDGEMENT FOR

CONTINUING EDUCATION

A continuing education recordkeeping service, in cooperation with the American College Testing (ACT) National Registry service for all those who work in and with libraries, information or media centers.

INFORMATION BOOKLET

This Booklet Belongs To Susan Viola

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WHY SEEK RECOGNITION FOR YOUR CONTINUING EDUCATION ACCOMPLISHMENTS? [1]

A lot of people are spending a lot of time, money, and energy grappling with the notion of developing a means for recognizing learning achievement and establishing quality control of educational opportunities. One question which many of your colleagues have already asked is why do it at all?

One of the principle reasons is to articulate a concept which is central to our personal and professional development. While this reason might seem a little too philosophical for some individuals, it is in its essence very practical because it forces us to look at all the possible opportunities for continuing our education and to make some quality judgments about them. One helpful way of looking at potential benefits of a national recognition program is to shake them out on the basis of individual benefits and benefits to the profession.

RECOGNITION: BENEFITS TO THE INDIVIDUAL

- At the very least, a recognition mechanism would provide for a centralized record of your learning activities, much like the transcripts in your high school, college, or university.
- If you need evidence of your learning achievements for the purpose of certification or job advancement, the records would be available in an orderly and systematic manner.
- The record of your learning achievements would give you a tool for planning your own learning future.
- Articulation of all the ways in which individuals learn might give you an idea about educational opportunities which you had never thought of as continuing education (journal clubs, technical reports, teaching a new course, in-house audits, etc.
- For some of us who need a little encouragement to be more assertive in pursuing educational opportunities to meet our learning needs, a national program might help us set up our own plan and get moving.
- National recognition of our individual learning achievements can also help us to feel better about what we are doing and it might even give us greater recognition from our colleagues.
- Many individuals have said that a national recognition mechanism of some sort will give them a tool to use in getting more support for continuing their education from employers, boards, administrators. If you are one of the latter, it might also give you a tool for interesting your library personnel in continuing their education.

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[1] James A. Nelson, Recognition for Your Continuing Education Accomplishments. CLENE Concept Paper no. 6 (Washington, D.C.: CLENE, 1979), pp. 5-7.

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INTRODUCTION

This Information Booklet describes the ways an individual may participate in the Voluntary Continuing Recognition Service for Continuing Education of the Continuing Library Education Network and Exchange (CLENE).

The Recognition Service is designed for all those who work in or with libraries, information, or media centers who are interested in maintaining an ongoing record of their continuing education efforts in a transcript-type format maintained through a nationwide computerized data base, and for those who, in addition, would like to receive recognition for their continuing education efforts by receiving a STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION. Participation in the first--the CLENE CONTINUING EDUCATION REGISTRY--does not obligate you in any way to apply for the STATEMENT OF ACKNOWLEDGEMENT. However, to qualify for the STATEMENT, it is necessary that you enter your continuing education activities in the REGISTRY.

This booklet describes the steps necessary to enter the National REGISTRY and the steps necessary to apply for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION.

Since the program will officially commence in 1980, it can be anticipated that some modifications and changes may be made to reflect accumulated experience and future actions, based on reactions and needs expressed in the field.

The CLENE Recognition Task Force welcomes written comments on this Information Booklet from all individuals and organizations involved. Comments or suggestions should be directed to: CLENE RECOGNITION SERVICE, 620 Michigan Avenue, N.E., Washington, D.C. 20064.

Your interest and cooperation with the Recognition Task Force, as it seeks to implement this most important service, will be deeply appreciated.

--Ruth Patrick, Ph.D.
Chairperson
CLENE Recognition Task Force

--Sub-Task Force on Preparation of this INFORMATION BOOKLET:

Ruth Person
Betty Stone
Micki Jo Young

February 1980

For two definitions of continuing education see page iv.

DEFINITIONS

Continuing education is a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with information, library, media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn. It is broader than staff development which is usually initiated by an organization for the growth of its own human resources.[1]

Diagram Definition of Continuing Education[2]

CONTINUING INFORMATION, LIBRARY, MEDIA EDUCATION

maintains,	knowledge
develops,	competencies
or	technical skills
increases	performance standards
	interpersonal relations

used by information, library, media personnel
to provide
service needed by: clients
public

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[1] The Council on Quality Continuing Library Education: Information--Library--Media Programs, A Program for Quality in Continuing Education for Information, Library, and Media Personnel: Policy Statement, Criteria for Quality, and Provider Approval System (Washington, D.C.: The Council on Quality Continuing Library Education, 1980), p. 2. (Multilithed.)

[2] Adapted from: Patrick Corcoran, "Keynote Address Seventh Annual Conference on Continuing Medical Education," Continuing Medical Education Newsletter, 8 (November 1979), 5.

GENERAL INFORMATION

The Whole Recognition Service Is Made Up of Several Parts

In order to be of the most use to individuals, employing organizations, and the profession at large, the national voluntary program for recognizing achievement in continuing education and quality in providing continuing education activities has generated activities by the Continuing Library Education Network and Exchange (CLENE) in five areas:

1. Development of Criteria for Quality activities.
2. Establishment of a Provider Approval System to determine effectively if the criteria are met adequately.
3. Establishment and maintenance of a national recordkeeping mechanism for achievement of continuing education participation.
4. Establishment of the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION.
5. Ongoing support services for the individual participant and for the providers of continuing education to strengthen the overall system of continuing education for information, library, media personnel.

Areas 1 and 2 are addressed in a separate publication entitled: A PROGRAM FOR QUALITY IN CONTINUING EDUCATION FOR INFORMATION, LIBRARY AND MEDIA PERSONNEL: POLICY STATEMENT, CRITERIA FOR QUALITY, AND PROVIDER APPROVAL SYSTEM. This document was written by the Council on Quality Continuing Library Education: Information -- Library -- Media Programs, a group of seven nationally known professional leaders. This statement went through numerous drafts for review and reaction by a wide representation of the information, library, media community.

This Information Booklet addresses Areas 3 and 4--a national recordkeeping mechanism for recording your participation in continuing education activities and the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION. The basic function of the recordkeeping system is maintaining an orderly national record of the learning activities in which you have participated. It will provide you with a service much like the registrar's office of your school system or college or university.

In its function of anchoring your planned program of learning, the recordkeeping system will serve as a guide to where you want to go and a road map of your milestone achievements along the way. It will be a tool for your own learning program. In its function as a research resource, the system will generate records of great value to planners and researchers trying to improve the overall quality of continuing education for individuals. The 11 types of anonymous statistics that are summarized and sent to each participating association each year include: the number of course completions and Transcript Requests; the total percentage distribution of all responses to the course evaluation items; a list of courses for which more than 10% (or whatever per cent desired) of the participants gave unsatisfactory ratings on any of the course evaluation items during the 12 month period covered in the report.

Area 5--ongoing support services--places the recognition system in its relationship with other support services which aid the individual and the profession as a whole, thus making the collective impact far more productive.

Along with the need-to-know is the need to find out what is available. Therefore, an integral part of the program is the dissemination of of program information about continuing education opportunities. Examples of sources for this type of information are three of CLENE'S PUBLICATIONS: Annual Directory of Continuing Education Opportunities, The Continuing Education Communicator (short listings on a monthly basis), and the CLENExchange which covers current happenings in continuing education, nationwide.

CLENE's Long Range Plan for the future includes planning for other types of support services. These include: development of self-assessment instruments; workshops and competency tests; development of needs assessment instruments; publication of a Journal of Continuing Education; promotion of the concept that government, and other funding sources, should provide financial aid for part-time practitioner learners.

Summary of Some Basic Concepts of the National Voluntary Recognition Service[1]

Some basic concepts in the nationwide recognition system, which are central to understanding it, are presented below.

- Recognition for continuing education is earned by individuals only by participation in continuing education activities. It is not intended as a means of honoring practitioners for long and faithful service to the public or to the profession. It is not intended to certify competence.

- The voluntary recognition program is for everyone who works in or with information, library, media services.

- Use of the recognition program is voluntary for individuals, providers, and employing institutions. There is no implicit support for the concept or practice of mandatory continuing education in certification or licensure issues or for internal promotion issues. These are all local issues under the dominion of local control.

- The national program establishes "Criteria for Quality," guidelines for the approval and recognition of providers who meet the criteria, the record keeping function for use by individuals and organizations, and the issuance of Statements of Acknowledgement for participation in continuing education. The national program itself does not grant credit in any form.

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[1] Adapted from: James A. Nelson, Recognition for Your Continuing Education Accomplishments, CLENE Concept Paper No. 6 (Washington, D.C.: CLENE, 1979), pp. 22-25.

- There is an emphasis on what is often referred to as nontraditional educational methods and techniques as legitimate activities for participation in continuing education.

- The national program identifies and clarifies criteria which can be used to plan continuing education activities and programs. These same criteria will serve as guidelines for individuals to use in assessing the quality of activities which they may wish to select for themselves.

- The national program increases the visibility of continuing education and related issues for individuals working for with information, library, media services. With the focus on quality criteria, the profession at large will see all related issues better and the end result should be a greater awareness about continuing education within our profession.

- Development of a national program for recognizing continuing education achievement and establishing quality criteria is evolutionary. Literally thousands of individuals have had some form of input in this development and many more will continue to shape it as the concept is implemented into a system and is refined.

- There will have to be many other support services which will help maintain and amplify the national program. These will focus on both the individual and on continuing education providers.

- Whatever the actual mechanisms for recognition for assurance of quality, the national program will have to be compatible with other related programs at the state and national level.

The Recordkeeping System

At the heart of the national program for recognizing the achievement in continuing education is the recordkeeping system--the CLENE Library, Information, Media System National Continuing Education Registry.

The CLENE National Registry is being established as part of the American College Testing (ACT) Program National Registry, a continuing education recordkeeping service for professional associations that utilizes computer-maintained files. The CLENE National Registry has been designed to meet the needs and requirements of the information, library, media community while staying within the framework and constraints of the ACT National Registry.

The National Registry is designed so that the sponsor/provider has the main responsibility for creating and maintaining the information (input) in the files. The basic file is of sponsor/providers. Each sponsor/provider is assigned a unique four-letter code that identifies it throughout the system. The sponsor/provider enters information on each course/offering/activity it offers and each is assigned a four digit code. When the course/offering/activity is presented, the sponsor/provider enters student data and a class roster for those participants who wish to have a record established in the National Registry. The student identification number is the person's Social Security number. [1]

CLENE will make a concerted effort to get as many sponsor/providers as possible to participate in the CLENE National Registry. All sponsor/providers that have Approved Status for their entire program or a single offering and all Learning Consultants that have Approved Status will be required to participate in the CLENE National Registry. Procedures have been established, however, for individuals who wish to enter a record for an offering presented by a provider who does not participate in the CLENE National Registry.

Procedures have been designed in such a way that activities undertaken by the individual independent of an outside sponsor/provider can be entered into the CLENE National Registry. The individual becomes the sponsor/provider, has a unique sponsor code assigned, and prepares all of the forms to enter the information.

In summary, the records in the CLENE National Registry are based on Sponsor/Provider--Course/Offering/Activity--Student/Participant (See Figure 1-A). However, any individual can get a complete list of all his/her activities by requesting a transcript. (See Figure 1-B)

The basic measurement for all records of educational achievement is the contact hour equivalent of participation in a learning activity. For those activities which are not traditionally expressed in terms of contact hours (frequently measured by the designation of continuing education units--CEU's) or formal credit (academic course hours) there is a coversion system to translate achievement into contact hours. This is presented in APPENDIX A.

The contact hour used in this national voluntary recognition program os based on concepts which emerged from the development of the CEU (continuing education unit) which is the most generally accepted measure of non-formal education. This is a 50 minute hour which is acknowledged only when the entire activity is completed.

---

[1] More details may be obtained about the ACT National Registry by requesting from CLENE: THE ACT NATIONAL REGISTRY SERVICE: A Continuing Education Recordkeeping Service for Professional Associations. General Information. (Iowa City, Iowa; The American College Testing Program, 1980).

Fig. 1-A

RECORDS IN THE CLENE NATIONAL REGISTRY ARE BASED ON SPONSOR/PROVIDER--COURSE/OFFERING/ACTIVITY--STUDENT PARTICIPANT (by Social Security Number)

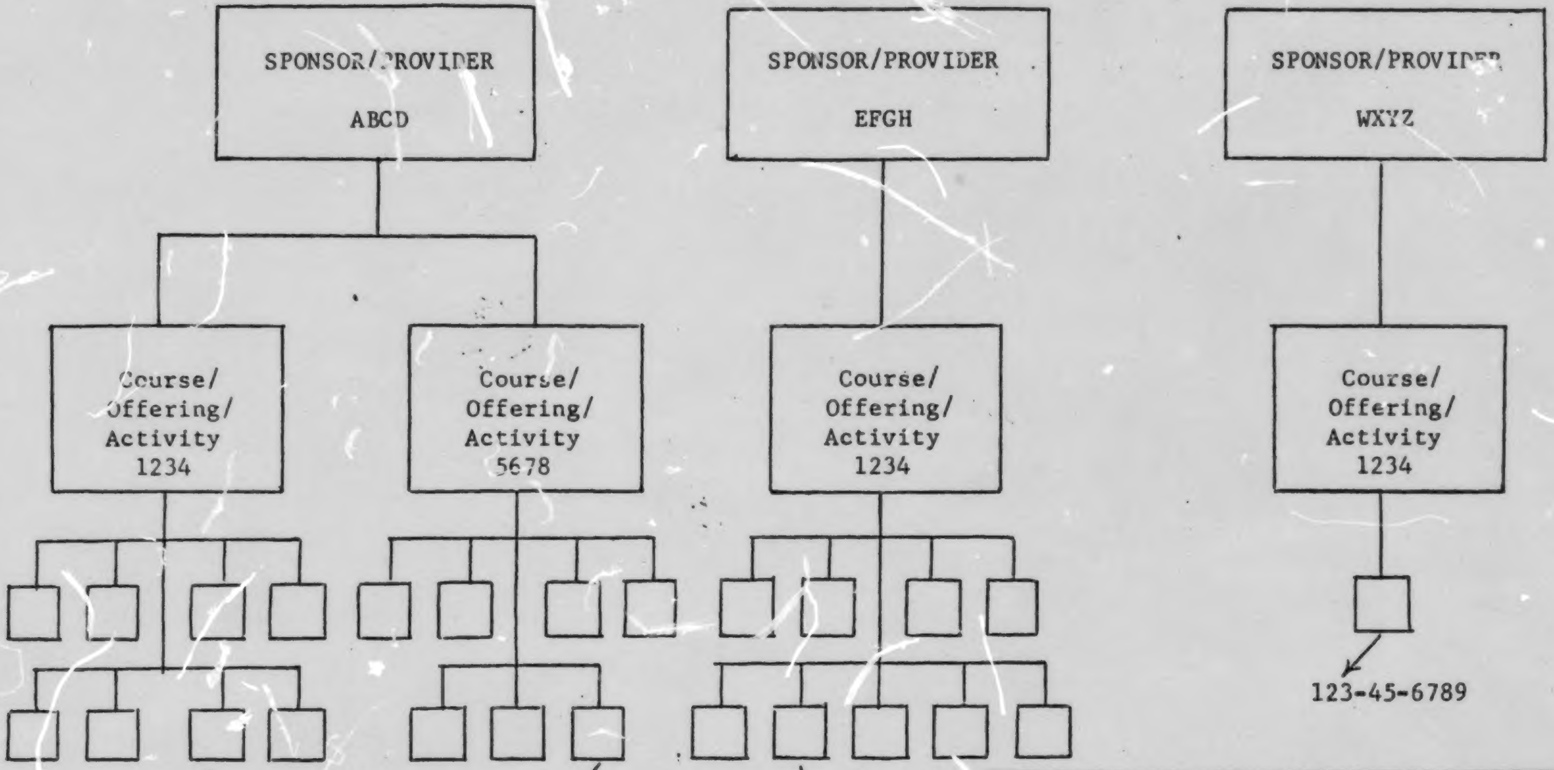
SPONSOR/PROVIDER
ABCD
SPONSOR/PROVIDER
EFGH
SPONSOR/PROVIDER
WXYZ
Course/
Offering/
Activity
1234
Course/
Offering/
Activity
5678
Course/
Offering/
Activity
1234
Course/
Offering/
Activity
1234
123-45-6789
123-45-6789
123-45-6789
123-45-6789
Participants

Fig. 1-B INDIVIDUALS CAN GET A COMPLETE LIST OF ALL THEIR ACTIVITIES BY REQUESTING A TRANSCRIPT

Transcript for:

J. R. Doe # 123-45-6789

ABCD/1234------------------30 CONTACT HOURS
ABCD/5678------------------12 CONTACT HOURS
EFGH/1234------------------30 CONTACT HOURS

Ways an Individual May Participate in the Voluntary Recognition Program

There are two options, or ways, in which you may participate in the program:

1. Individuals may choose to participate only in the central recordkeeping system. This service provides for:

   - Recording in the system all those activities that qualify for admission into the system;

   - Sending transcripts on request to anyone designated by the participant.

   This service is carried out in cooperation with the American College Testing Program (ACT) which maintains a permanent, central depository of continuing education records for professional associations.

2. Individuals may wish to participate in the central recordkeeping system, and in addition wish to receive a STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION. Application for the STATEMENT of ACKNOWLEDGEMENT is voluntary.

   The STATEMENT OF ACKNOWLEDGEMENT is based on a 3-year cycle. In order to qualify, 120 contact hours of continuing information, library, or media education must be accumulated within a 3-year period, of which 40 must be in Category 1. The remaining 80 hours may be in Category 1, or in any combination of categories within the credit hour limitations specified for each category. It is not necessary to have contact hours in all categories.

   Any amount of credit may be acquired at any time during the 3-year STATEMENT OF ACKNOWLEDGEMENT qualifying period. An individual may apply for the RECOGNITION STATEMENT at any time. No continuing education activities completed more than three years prior to the date on which the individual signed the application can be used to qualify for the RECOGNITION STATEMENT. During the 3-year period for which a RECOGNITION STATEMENT is valid, an individual should earn the contact hours needed for the next RECOGNITION STATEMENT. The STATEMENT is valid for a period of three years, beginning with the date on the application.

As activities are completed, a record of the hours involved should b sent to the ACT Registry as described in this Information Booklet in the next section. When the necessary 120 hours have been completed to qualify for a RECOGNITION STATEMENT, the individual should request that a Registry Transcript be sent to the CLENE office. At the same time, the individual should send a summary showing the way these activities fit into the various categories, using the APPLICATION FORM inserted into this booklet. Upon examination of these two documents--transcript and the APPLICATION FORM--the CLENE office will issue, if all the stated requirements have been met, a STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION.

Eligibility

Participation in the recognition system is voluntary. All persons who work in and with libraries, information, or media centers, may apply without regard to association membership of any kind. This includes administrators, clericals, educators, information specialists, librarians (with MLS), operating librarians (without MLS), library technicians, managers, media specialists, paraprofessionals, systems analysts, technical information specialists, trustees, volunteers, etc.

Recognition is presented to practitioners who earn it by engaging in continuing education activities. It is not intended as a means of honoring long and faithful service, or outstanding accomplishment in the profession. Further, the STATEMENT OF ACKNOWLEDGEMENT is neither a character reference nor a certification of competence, and may not be used for these purposes.

Since the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION is not intended to certify competence, passing examinations intended to measure competence, such as licensure examinations or certification or recertification examinations is not accepted toward qualification for the STATEMENT OF ACKNOWLEDGEMENT. However, learning activities of an individua in preparation for these types of examinations is accepted toward qualifying for the STATEMENT OF ACKNOWLEDGEMENT. Credit should not be claimed for education which is incidental to the regular activities of the practitioner.

The two sections that follow give you information on:

- How to enter the CLENE Continuing Education Registry and how to maintain a current and permanent record of your continuing education activities; and
- How you may qualify to receive a Statement of Acknowledgement for Continuing Education from CLENE

Participation is entirely voluntary. You may decide to only enter the Registry and not apply for a Statement of Acknowledgement. If you do wish a Statement of Acknowledgement, however, it is necessary that you enter the CLENE Registry which is carried out in cooperation with the ACT (American College Testing) Service--a nationwide continuing education recordkeeping service for professional associations.

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HOW TO ENTER THE CLENE INFORMATION LIBRARY MEDIA SYSTEM - NATIONAL CONTINUING EDUCATION REGISTRY: OVERALL INSTRUCTIONS

If you want to establish a permanent continuing education record in the CLENE National Continuing Education Registry, the decision is yours. . . it's a voluntary system.

A record of your participation can be entered for an offering/activity:

1. Presented by a Sponsor/Provider who participates in the CLENE National Registry--the Sponsor/Provider enters the information
2. Presented by a Sponsor/Provider who does not participate in the CLENE National Registry--you enter the information
3. Undertaken by you independently--you enter the information.

There is a charge of $3.00 for each offering/activity entered.

In return, you receive a confirmation card to show your record is in the CLENE National Registry. If you wish, you may request a transcript be prepared which will list all of the offerings/activities you have entered into the CLENE National Registry. (The transcript fee is $6.00) With the transcript service you will have a permanent record of your continuing education easily available to you and readily interpreted by other institutions and organizations. It will also provide you with a continuing way to look at your continuing education experience as a whole and enable you to discern and plan more systematically programs of study for the future.

The following pages describe how your information will be entered in the CLENE National Continuing Education Registry and how you can get your information from the CLENE National Registry.

How to enter an activity when the Sponsor/Provider participates in the CLENE National Registry. . . . . p. 13

How to enter an activity when the Sponsor/Provider does not participate . . . . p. 19

How to enter independent activities into the CLENE National Registry. . . . . p. 35

Note: The Form that follows immediately on the next page (unnumbered) is the Student Data Form that you need to fill out in order for National Registry to create a record for you. Instructions for its use are given on pages 13, 27, and 45.

BEFORE FILLING OUT YOUR STUDENT FORM. . . . .

To make sure that your record is correct and that your Confirmation Card will reach you at your home address, your Student Form must be complete and accurate. Before beginning, please take a moment to read these five reminders:

Use pencil only	Inks (including ball point) are invisible to the scanning machine that "reads" this form. Your form cannot be processed unless you use a **pencil.**
Fill in the ovals completely	Every time your print a number or letter in one of the boxes, you must fill in one of the ovals in the column beneath it. Fill in the entire oval; **don't** just use a check-mark or an "X." The machine reads these blackened ovals.
Enter last name first	In block C, give your last name first, followed by your first name. Otherwise, your record will appear out of sequence.
Leave a space between words	In blocks C, D, and E, leave a space (that is, a blank box) between words or groups of numbers. Blacken the small rectangle directly beneath **every** box you leave blank. If your name or city is hyphenated, enter the hyphen in the appropriate box and then blacken the "-" oval beneath the "Z" oval in that column.
Make sure the form is clean and undamaged	A form that is smudged, torn, folded, or stapled cannot be processed. If your form is smudged or damaged, ask for a new one. If you've already entered information on the damaged form, be sure to transfer it to the new form.

THANK YOU!

N

IF YOUR ADDRESS IS NOT IN THE UNITED STATES, PLEASE PRINT YOUR MAILING ADDRESS ON THE LINES BELOW.

House Number and Street

City, State or Province, and Postal Code

Country

STUDENT FORM

A

I authorize the submission of this form and of other information about my participation in this course to ACT, which will record and maintain this information

Name of Course (Please Print)

Signature (Do Not Print)

Date

B

Please mark one response to each of these statements.

A = Agree
NU = Neutral/Undecided
D = Disagree

A	NU	D	
○	○	○	Objectives of course or workshop were clear
○	○	○	Concepts, activities, and materials met the objectives
○	○	○	Instructor understood thoroughly the material covered
○	○	○	Instructor's presentation was clear and well organized
○	○	○	This course or workshop was helpful

STATE CODE LIST

Ala.	01
Alaska	02
Ariz	03
Ark.	04
Calif	05
Colo	06
Conn.	07
Del	08
D.C.	09
Fla	10
Ga	11
Hawaii	12
Idaho	13
Ill.	14
Ind	15
Iowa	16
Kans	17
Ky	18
La	19
Maine	20
Md	21
Mass	22
Mich	23
Minn	24
Miss	25
Mo	26
Mont	27
Nebr	28
Nev	29
N.H	30
N.J.	31
N.Mex	32
N.Y	33
N.C	34
N.Dak	35
Ohio	36
Okla	37
Oreg.	38
Pa	39
R.I.	40
S.C	41
S.Dak	42
Tenn	43
Tex	44
Utah	45
Vt	46
Va	47
Wash	48
W.Va	49
Wis	50
Wyo	51
Canada	53*
All Other	55*

*See Other Side

C NAME (Last Name First)
(Note: Use a Soft Lead Pencil Only)

D HOUSE NUMBER AND STREET
"PO BOX" AND NUMBER, "RR" AND NUMBER

E CITY
(Do Not Enter State in This Area)

F STATE CODE

G ZIP CODE

H SEX (Optional)

Female ○

Male ○

I DATE OF BIRTH

Month | Day | Year

○ Jan
○ Feb
○ Mar
○ Apr
○ May
○ June
○ July
○ Aug
○ Sept
○ Oct
○ Nov
○ Dec

J IDENTIFICATION NUMBER

K If your name has changed since your last submission to the Registry, print your former name below.

Please Print

L RACIAL/ETHNIC BACKGROUND (Optional)

○ Hispanic
○ American Indian or Alaskan Native
○ Asian or Pacific Islander
○ Black/Negro, not Hispanic
○ Caucasian/White, not Hispanic

M SPECIAL USE AREA

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HOW TO ENTER AN ACTIVITY WHEN THE SPONSOR/PROVIDER PARTICIPATES IN THE CLENE NATIONAL REGISTRY

When the Sponsor/Provider participates in the CLENE National Continuing Education Registry, most of the information is entered once by the Sponsor and the individuals (students) have only one form to complete if they wish to have their participation recorded in the Registry.

The Sponsor will provide a Student Data Form for you to fill out. This form authorizes the Sponsor to send your information to the Registry and authorizes the Registry to create a record for you. It must be accompanied by a $3.00 fee. The sponsor may ask for remittance at the time the form is completed or he may have included the amount in the course fee or tuition charged.

HOW TO FILL OUT THE STUDENT DATA FORM

Refer to the sample form on the facing page.

BLOCK A

1. Name of Course

   Use the name of the course as indicated by the Sponsor/Provider.
2. Sign your name using your regular signature.
3. Fill in the date the offering was completed.

BLOCK B

4. These five statements represent your evaluation of the course/offering. Fill in one oval for each statement using this key:

   A = Agree
   NU = Neutral/Undecided
   D = Disagree

   Your opinions expressed here will be combined with those of the other participants of this course/offering and the totals (expressed in percentages) will be sent to the Sponsor/Provider.

BLOCKS C, D, AND E

Your name, address, and city are to be entered here using the following rules:

- Fill in only one character per box.
- Leave a space between words or groups of numbers by leaving a box blank (empty).
- Every time you print a number or letter in one of the boxes, you must fill in the appropriate oval in the column beneath it.
- When you leave a box blank (a space), fill in the rectangle directly beneath that box.

- No punctuation marks may be used except for hyphens. When a name or city is hyphenated, fill in the oval beneath the "Z" oval in that column.
- Be sure to fill in the entire oval or rectangle. A check-mark or an "X" will not be read by the computer scanner.

5. Name
   - Enter your last name first.
   - Leave one space.
   - Enter your first name or first initial.
   - Leave one space.
   - Enter your middle name or initial.
   - There can not be more than 26 characters (letters and spaces) entered for your name.
   - If you use less than 26 boxes, fill in the rectangle for all of the columns with blank boxes.
6. Mailing Address
   - Enter you address expressed as:

     house number and street OR
     post office box and number OR
     rural route and number
   - You may enter "½" in one box but no other fraction can be expressed.
7. City

   Enter the name of your city but not the state.

BLOCK F

8. State
   - Select the appropriate state code (a two digit code) from the list along the left margin of the Form.

     EXAMPLE: Virgina is 47
   - Fill in the number in the two boxes.
   - Fill in the appropriate oval in each column.

BLOCK G

9. Zip Code
   - Write the zip code in the 5 boxes provided.
   - Fill in the appropriate oval for each column.

BLOCK H

10. Sex

This is an optional question. If you have no objection, fill in the appropriate oval.

BLOCK I

11. Date of Birth

- Fill in the oval next to the appropriate month.
- Write the day of the month in the two boxes provided. Use a leading zero for all single digit dates.

  EXAMPLE: the 5th would be written 05
- Fill in the appropriate oval in each column.
- Write in the last two digits of the year of your birth in the two boxes provided.
- Fill in the appropriate oval in each column.

BLOCK J

12. Identification Number

Your Social Security Number will be your student identification number.

- Write in the 9 digits of your number omitting the hyphens.
- Fill in the appropriate oval in each column.

BLOCK K

13. Name Change

If your name has changed since the last time you entered a record in the Registry, print your former name. If no change has occurred, leave blank.

BLOCK L

14. Race/Ethnic Background

This is an optional question. If you have no objection, fill in the oval next to the appropriate racial/ethnic designation.

This Student Data Form will be collected by the Sponsor/Provider and sent to the CLENE National Registry Office in Iowa City, Iowa.

After the record has been created, you will receive in the mail, a Confirmation Card. You may use this card to correct any errors you detect in the data:

1. Errors in your name, identification number, or date of birth should be noted on the card and the card sent to the Iowa City address.

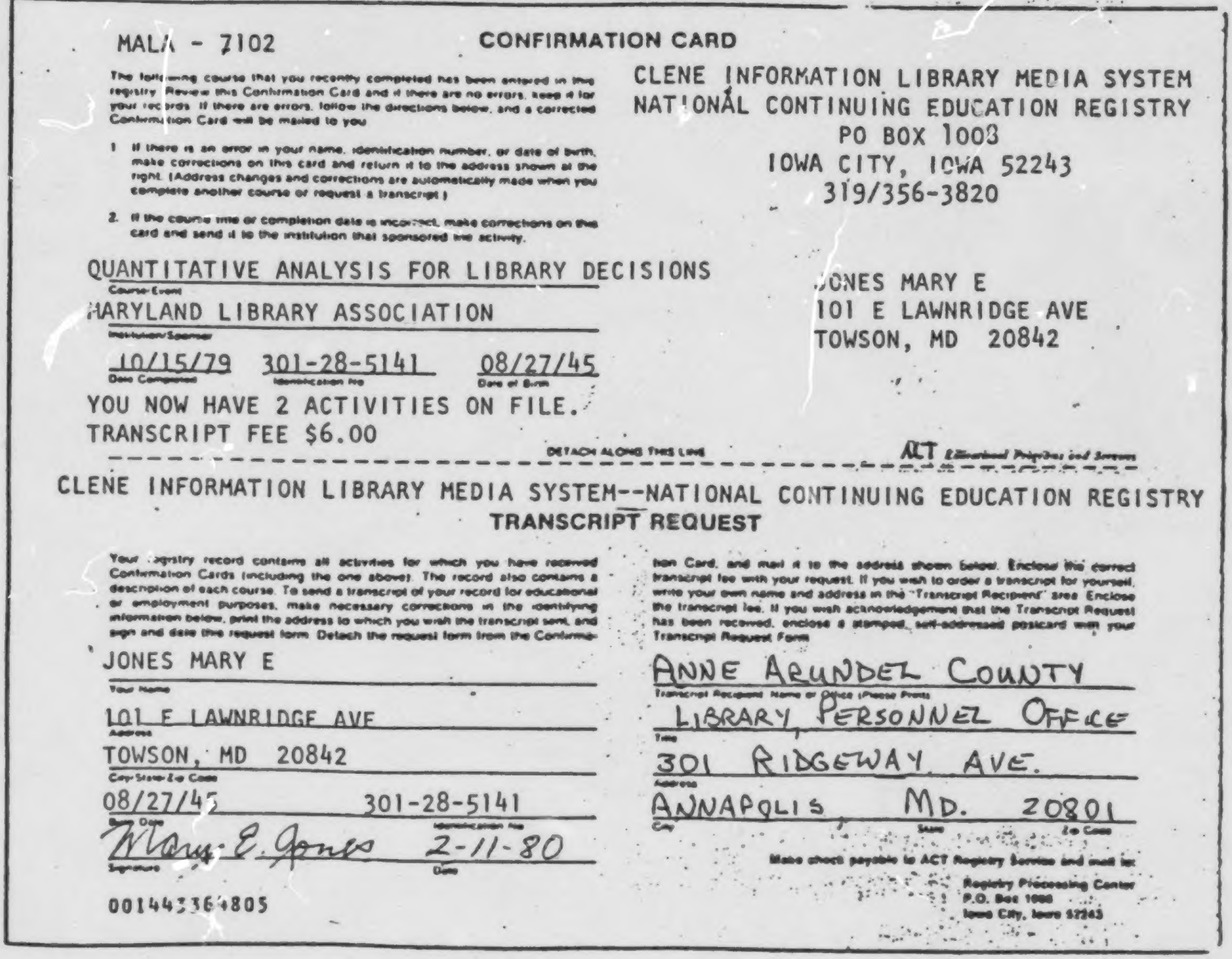
2. Errors in the course title or completion date should be noted and the card sent to the Sponsor/Provider.

On the bottom of the Confirmation Card is a Transcript Request Form. You may fill it out and mail it to the Iowa City address along with a $6.00 check anytime you wish to request a transcript. Only you can request a transcript of your record. You authorize the issuing of the transcript when you sign the form.

You may have the transcript mailed to yourself or to anyone else you designate by filling out the name and address block in the right column of the form.

If you wish to receive an acknowledgement that the Transcript Request has been received, you may enclose a stamped, self-addressed postcard with your form.

Confirmation Card and Transcript Request



MALA - 7102

CONFIRMATION CARD

The following course that you recently completed has been entered in the registry. Review this Confirmation Card and if there are no errors, keep it for your records. If there are errors, follow the directions below, and a corrected Confirmation Card will be mailed to you.

1. If there is an error in your name, identification number, or date of birth, make corrections on this card and return it to the address shown at the right. (Address changes and corrections are automatically made when you complete another course or request a transcript.)
2. If the course title or completion date is incorrect, make corrections on this card and send it to the institution that sponsored the activity.

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

QUANTITATIVE ANALYSIS FOR LIBRARY DECISIONS
Course/Event

MARYLAND LIBRARY ASSOCIATION
Institution/Sponsor

10/15/79 Date Completed   301-28-5141 Identification No   08/27/45 Date of Birth

YOU NOW HAVE 2 ACTIVITIES ON FILE.
TRANSCRIPT FEE $6.00

JONES MARY E
101 E LAWNRIDGE AVE
TOWSON, MD 20842

DETACH ALONG THIS LINE

ACT Educational Programs and Services

CLENE INFORMATION LIBRARY MEDIA SYSTEM--NATIONAL CONTINUING EDUCATION REGISTRY

TRANSCRIPT REQUEST

Your registry record contains all activities for which you have received Confirmation Cards (including the one above). The record also contains a description of each course. To send a transcript of your record for educational or employment purposes, make necessary corrections in the identifying information below, print the address to which you wish the transcript sent, and sign and date the request form. Detach the request form from the Confirmation Card, and mail it to the address shown below. Enclose the correct transcript fee with your request. If you wish to order a transcript for yourself, write your own name and address in the "Transcript Recipient" area. Enclose the transcript fee. If you wish acknowledgement that the Transcript Request has been received, enclose a stamped, self-addressed postcard with your Transcript Request Form.

JONES MARY E
Your Name

101 E LAWNRIDGE AVE
Address

TOWSON, MD 20842
City/State/Zip Code

08/27/45 Birth Date   301-28-5141 Identification No

Mary E. Jones Signature   2-11-80 Date

001443364805

ANNE ARUNDEL COUNTY
Transcript Recipient Name or Office (Please Print)

LIBRARY, PERSONNEL OFFICE
Title

301 RIDGEWAY AVE.
Address

ANNAPOLIS, City   MD. State   20801 Zip Code

Make check payable to ACT Registry Service and mail to:

Registry Processing Center
P.O. Box 1008
Iowa City, Iowa 52243

Official Record

PAGE 1 OF 1
02/14/80

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

THIS RECORD SENT AT REQUEST OF:

JONES MARY E
101 E LAWNRIDGE AVE
TOWSON, MD 20842
IDENT. NO.: 301-28-5141

ANNE ARUNDEL COUNTY LIBRARY
PERSONNEL OFFICE
301 RIDGEWAY AVE
ANNALOPIS, MD 20801

COURSE CODE	DATE COMPLETED	COURSE TITLE AND DESCRIPTION
CUA-7782	05/20/79	GOVERNMENT DOCUMENTS 15 NATL CL CATHOLIC UNIVERSITY OF AMERICA A COURSE THAT INTRODUCES STUDENTS TO THE BIBLIOGRAPHIC ACCESS OF GOVERNMENT DOCUMENTS. AWARDED AS 3 CREDITS
MALA-7102	10/15/79	QUANTITATIVE ANALYSIS FOR LIBRARY DECISIONS 40 NATL CL MARYLAND LIBRARY ASSOCIATION A ONE-WEEK WORKSHOP COVERING STATISTICAL ANALYSIS, LINEAR PROGRAMMING, MARKOV ANALYSIS, AND OTHER QUANTITATIVE METHODS FOR LIBRARY DECISIONS AWARDED AS 4 CEU'S
		- - - - 2 EDUCATIONAL ACTIVITIES ON FILE - - - - - - - - 02/14/80 TRANSCRIPT VALIDATION NO. 79-001-00235 APPROVING BODIES ARE SHOWN AS: NATL CL (NATIONAL COUNCIL); STAT CL (STATE/MULTI-STATE COUNCIL); OTHER PR (OTHER PROFESSIONS).

ACT *Educational Programs and Services*

SPONSOR DESCRIPTION FORM

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY

Your Registry number
(Assigned at time of participation)

C. ______

SPONSOR CODE ______

A - Add
C - Change
D - Delete

TYPE ______

SPONSOR NAME ______

ADDRESS LINE 1 ______

ADDRESS LINE 2 ______

CITY ______ STATE ______ ZIP CODE ______

SPONSOR REGISTRY OFFICER ______

TITLE ______

BY ______

DATE ______ ______

ACT

ENTERED ______ VERIFIED ______ CHECKED ______

DATE ______ DATE ______ DATE ______

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HOW TO ENTER AN ACTIVITY WHEN THE SPONSOR/PROVIDER DOES NOT PARTICIPATE IN THE CLENE NATIONAL REGISTRY

If you have participated in a course/offering where the Sponsor/Provider did not provide the opportunity to enter your record into the CLENE National Continuing Education Registry, you can initiate the action yourself.

Step 1. Write to CLENE, Inc. and request a Form Package for Group Activities The address is:

CLENE Recognition Service
620 Michigan Avenue, N.E.
Washington, D.C. 20064

There is no charge for this package.

Step 2. You will receive the following forms.

1. Sponsor Description Form
2. Course/Activity Description Form
3. Student Data Form
4. Class Identification Form

Complete each form as shown in the instructions that follow; prepare a check for the entrance fee of $3.00 made payable to REGISTRY SERVICE; and mail the forms and check to:

CLENE Recognition Service
620 Michigan Avenue, N.E.
Washington, D.C. 20064

Step 3. The CLENE office will provide additional information and send the completed forms to the Iowa City, Iowa office of the CLENE National Registry.

Step 4. You will receive a confirmation card to show your record has been created in the CLENE National Registry. Check the information for errors.

HOW TO FILL OUT THE SPONSOR DESCRIPTION FORM

Refer to the sample form on the facing page.

You will not have all the necessary information to complete this Form. The additional information will be provided by the CLENE office.

Sponsor Name: Fill in the name of the Sponsor/Provider who presented the course/offering. Place one letter per compartment. Leave the compartment blank to indicate a space.

Address: Fill in the mailing address for the Sponsor/Provider using up to two lines for the address and numbers; print the city on the line indicated; use the two-letter abbreviation for the state; and fill in the zip code where indicated.

CLENE
CONTINUING LIBRARY
EDUCATION NETWORK
AND EXCHANGE

CLENE Information Library Media System
National Continuing Education Registry

Course Form

Office Use
0 0 9
Action

Instructions: Complete all information. Please type or print clearly.

CHECK ONE:

This is a:

☐ New course or activity (Version Number "01"—Course Number not previously on Registry file.)

☐ New version of a course already on file. (Use next sequential Version Number. Previous version will no longer be active, but will be kept on file with no change in description data.)

☐ Revision of a Course Form previously submitted to Registry. (The description data for the version you specify will be revised using the information on this form.)

Effective Date: Month Day Year — The completion dates for this version of this course must be after this date.

Institution: Code (assigned by the Registry) — Institution Name

Start — Elite Stop — Pica Stop

Course: Course Number (permanent course number assigned by sponsor) — Course Title (50 characters maximum)

Note that a new version for a course closes the earlier version. ("Version Number" refers to a course, not a section. If you wish to distinguish different sections of a course, use "Section Number" on the Class Form, **not** "Version Number.")

Version: Version Number

Course Description:

Line 1 (50 characters maximum)

Line 2 (50 characters maximum)

Line 3 (50 characters maximum)

Line 4 (50 characters maximum) (Indicate credit, CEU value, etc., on this line)

Type of Course:

1 = Classroom/Formal Group Instruction (Includes short course)
2 = Academic Independent Study
3 = Practicum/Internship
4 = Institute/Seminar/Workshop (Includes specific conference program)
5 = Home Study/Correspondence Course
6 = Electronically-delivered Programs
7 = Self-instructional Programs
8 = Papers, Publications, Books
9 = Study/Discussion Groups (Includes lecture series, journal clubs, etc.)
0 = Other

Subject: Subject Code

Use 0000 for undetermined or blank.
A list of subject codes is available from CLENE.

Measure of Activity: Quantity of Contact Hours . (Tenths) — Approving Body

Approving Bodies are:
NATL CL
STAT CL
OTHER PR

This form was completed by:

Signature

Name

Title

Signature of Registry Officer — Date

Name of Registry Officer

Mail completed form to:

CLENE Information Library Media System
National Continuing Education Registry
P.O. Box 1008
Iowa City, Iowa 52243

The American College Testing Program

HOW TO FILL OUT THE COURSE/ACTIVITY DESCRIPTION FORM

Refer to the sample form on the facing page.

This is a: Leave blank.

Effective Date:

- If the course/activity was a one-day offering, use the day before as the Effective Date. The day of the offering will be used as the Completion Date on the Forms that follow.
- If the course/activity was presented over more than one day, use the day the course/activity began as the Effective Date.

The date must be written as month-day-year expressed as two-digits each. When a month or day is a single digit, a leading zero must be used.

EXAMPLE: February 7, 1980

0 2	0 7	8 0
Month	Day	Year

Sponsor:

Code Leave blank. This four character code will be supplied by the CLENE office.

Name Fill in the name of the Sponsor/Provider of this course/activity. Use the complete, precise name of the organization. (This name should be the same as the Sponsor's name on the Sponsor Description Form.)

Course:

Number This is the number of the course as it is designated by the Sponsor.

- If you do not know the number, leave this blank.
- If the course was described in a schedule or announcement with a number, please fill it in.
- If the course number has fewer than four digits, use leading zeros.

EXAMPLE: Course Number 721

0 7 2 1
Course Number

- If the course number has more than four digits, write the number at the left margin under the word "Course:" and the CLENE office will modify the number as necessary.

EXAMPLE: Course:
403AD8
Course Number

- If the course/activity was described as being "approved" by the accrediting/approval body of a professional association in an outside discipline, write the number "9" in the first compartment on the left, then fill in the course number. (See Measure of Activity below.)

EXAMPLE:

9 5 4 3
Course Number
(permanent course number assigned by sponsor)

Course/Activity Title:

Use the title of the course/activity as it was listed in the announcement or schedule. The title can not be longer than 50 characters including spaces and punctuation marks. Abbreviate and/or truncate (cut off) the title as necessary.

NOTE: This form was designed to aid persons who type the information. If the typing is begun at the left of the line, the lines at the right end mark the end of fifty positions. The first mark is for elite typewriters--12 characters to the inch. The second mark is for pica typewriters--10 characters to the inch. Persons who fill the form in by hand must count the characters used.

EXAMPLE:

Start | Elite Stop | Pica Stop

Personnel Admin for Managers of Non-Profit Org's

Course/Activity Title (50 characters maximum)

Version: Leave blank.

Course/Activity Description:

These four lines can be used to describe the course/activity: its nature, objectives, subject areas, scope, and/or length. There is a limit of 50 characters per line (including letters, numbers, spaces, and punctuation marks).

- The last 25 positions of the fourth line are reserved for information on the unit of measure for the course/activity. Starting with position 26, fill in one of the following phrases and complete with the appropriate number.

  Awarded as ### credits

  Awarded as ### CEU's

  Audited--## credits

EXAMPLE:

Awarded as 3 credits

Line 4 (50 characters maximum)

OR

Awarded as 10.5 CEU's

Line 4 (50 characters maximum)

- If no units were awarded, leave the last 25 positions blank.

Type of Learning Activity:

Select the number for the category that best describes the type of learning activity for this course/activity. Type "8" will probably not apply in this case and "0" will only rarely apply.

Subject: A four digit HEGIS code should be selected and filled in here. *(The Expanded HEGIS Subject Code list is included in the Form Package.)* Choose the code that best describes the overall subject content and scope of the course/activity.

Measure of Activity:
Quantity of Contact Hours

The standard measure for all activities entered into the CLENE National Registry is the contact hour. All other units of measure must be converted using the Conversion Chart *(included in the Form Package)* so that the values will standard. Look up the Type of Activity, compute the contact hours, and fill in the boxes. The time can be expressed in tenths of an hour if necessary.

EXAMPLE:

1 hour and thirty minutes | | |1| . |5|

Quantity (Tenths)
of
35 hours |3|5| . |0| Contact Hours

Approving Body: By definition, the only approving body that could apply is from another profession. (All sponsors approved by the CLENE National Council or a CLENE designated State or Multistate Council must participate in the CLENE National Registry.) If the announcement, application, or completion certificate indicates that this course/activity was approved by a professional association's accrediting/approval body, fill in "OTHER PR" starting with the first compartment on the left. If not, leave blank.

This form was completed by:

Leave blank.

BEFORE FILLING OUT YOUR STUDENT FORM. . . . .

To make sure that your record is correct and that your Confirmation Card will reach you at your home address, your Student Form must be complete and accurate. Before beginning, please take a moment to read these five reminders:

Use pencil only . . . . Inks (including ball point) are invisible to the scanning machine that "reads" this form. Your form cannot be processed unless you use a **pencil.**

Fill in the ovals completely . . . . Every time your print a number or letter in one of the boxes, you must fill in one of the ovals in the column beneath it. Fill in the entire oval; **don't** just use a check-mark or an "X." The machine reads these blackened ovals.

Enter last name first . . . . In block C, give your last name first, followed by your first name. Otherwise, your record will appear out of sequence.

Leave a space between words . . . . In blocks C, D, and E, leave a space (that is, a blank box) between words or groups of numbers. Blacken the small rectangle directly beneath **every** box you leave blank. If your name or city is hyphenated, enter the hyphen in the appropriate box and then blacken the "-" oval beneath the "Z" oval in that column.

Make sure the form is clean and undamaged . . . A form that is smudged, torn, folded, or stapled cannot be processed. If your form is smudged or damaged, ask for a new one. If you've already entered information on the damaged form, be sure to transfer it to the new form.

THANK YOU!

N

**IF YOUR ADDRESS
IS NOT IN THE UNITED STATES,
PLEASE PRINT YOUR MAILING ADDRESS
ON THE LINES BELOW.**

House Number and Street

City, State or Province, and Postal Code

Country

STUDENT FORM

A I authorize the submission of this form and other information about my participation in this course to ACT, which will record and maintain this information.

Name of Course (Please Print) ______________________________

Signature (Do Not Print) ______________________________ Date ____________

B **Please mark one response to each of these statements.**

A = Agree
NU = Neutral/Undecided
D = Disagree

A	NU	D	
○	○	○	Objectives of course or workshop were clear
○	○	○	Concepts, activities, and materials met the objectives
○	○	○	Instructor understood thoroughly the material covered
○	○	○	Instructor's presentation was clear and well organized
○	○	○	This course or workshop was helpful

C **NAME (Last Name First)**
(Note: Use a Soft Lead Pencil Only)

○ A ○ B ○ C ○ D ○ E ○ F ○ G ○ H ○ I ○ J ○ K ○ L ○ M ○ N ○ O ○ P ○ Q ○ R ○ S ○ T ○ U ○ V ○ W ○ X ○ Y ○ Z ○ -

D **HOUSE NUMBER AND STREET**
"PO BOX" AND NUMBER, "RR" AND NUMBER

○ A ○ B ○ C ○ D ○ E ○ F ○ G ○ H ○ I ○ J ○ K ○ L ○ M ○ N ○ O ○ P ○ Q ○ R ○ S ○ T ○ U ○ V ○ W ○ X ○ Y ○ Z ○ -
○ ½ ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0

E **CITY**
(Do Not Enter State in This Area)

○ A ○ B ○ C ○ D ○ E ○ F ○ G ○ H ○ I ○ J ○ K ○ L ○ M ○ N ○ O ○ P ○ Q ○ R ○ S ○ T ○ U ○ V ○ W ○ X ○ Y ○ Z ○ -

STATE CODE LIST

Ala.	01
Alaska	02
Ariz.	03
Ark.	04
Calif.	05
Colo.	06
Conn.	07
Del.	08
D.C.	09
Fla.	10
Ga.	11
Hawaii	12
Idaho	13
Ill.	14
Ind.	15
Iowa	16
Kans.	17
Ky.	18
La.	19
Maine	20
Md.	21
Mass.	22
Mich.	23
Minn.	24
Miss.	25
Mo.	26
Mont.	27
Nebr.	28
Nev.	29
N.H.	30
N.J.	31
N.Mex.	32
N.Y.	33
N.C.	34
N.Dak.	35
Ohio	36
Okla.	37
Oreg.	38
Pa.	39
R.I.	40
S.C.	41
S.Dak.	42
Tenn.	43
Tex.	44
Utah	45
Vt.	46
Va.	47
Wash.	48
W.Va.	49
Wis.	50
Wyo.	51
Canada	53*
All Other	55*

*See Other Side

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F **STATE CODE**

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 0 (first digit)
○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0 (second digit)

G **ZIP CODE**

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0

H **SEX (Optional)**

Female ○

Male ○

I **DATE OF BIRTH**

Month: ○ Jan. ○ Feb. ○ Mar. ○ Apr. ○ May ○ June ○ July ○ Aug. ○ Sept. ○ Oct. ○ Nov. ○ Dec.

Day: ○ 1 ○ 2 ○ 3 ○ 0 / ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0

Year: ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 0 / ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0

J **IDENTIFICATION NUMBER**

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0

K If your name has changed since your last submission to the Registry, print your former name below.

____
Please Print

L **RACIAL/ETHNIC BACKGROUND (Optional)**

- ○ Hispanic
- ○ American Indian or Alaskan Native
- ○ Asian or Pacific Islander
- ○ Black/Negro, not Hispanic
- ○ Caucasian/White, not Hispanic

M **SPECIAL USE AREA**

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 0

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HOW TO FILL OUT THE STUDENT DATA FORM

Refer to the sample form on the facing page.

BLOCK A

1. Name of Course

   Use the title of the course as indicated on the Course/Activity Description Form.

2. Sign your name using your regular signature. This authorizes the CLENE National Registry to create a record for you.

3. Fill in the date the offering was completed. If the course/activity was held on only one day, use that date as the Completion Date.

BLOCK B

4. These 5 statements represent your evaluation of the course/activity. Fill in one oval for each statement using this key:

   A = Agree
   NU = Neutral/Undecided
   D = Disagree

BLOCKS C, D, AND E

Your name, address, and city are to be entered here using the following rules:

- Fill in only one character per box.
- Leave a space between words or groups of numbers by leaving a box blank (empty).
- Every time you print a number or letter in one of the boxes, you must fill in the appropriate oval in the column beneath it.
- When you leave a box blank (a space), fill in the rectangle directly beneath that box.
- No punctuation marks may be used except for hyphens. When a name or city is hyphenated, fill in the oval beneath the "Z" oval in that column.
- Be sure to fill in the entire oval or rectangle. A check-mark or an "X" will not be read by the computer scanner.

5. Name

   - Enter your last name first.
   - Leave one space.
   - Enter your first name or first initial.
   - Leave one space.
   - Enter your middle name or initial.
   - There can not be more than 26 characters (letters and spaces) entered for your name.
   - If you use less than 26 boxes, fill in the rectangle for all of the columns with blank boxes.

6. Mailing Address

- Enter your address expressed as:

  house number and street OR
  post office box and number OR
  rural route and number

- You may enter "½" in one box but no other fraction can be expressed.

7. City

Enter the name of your city but not the state.

BLOCK F

8. State

- Select the appropriate state code (a two digit code) from the list along the left margin of the Form.

  EXAMPLE: Virginia is 47.

- Fill in the number in the two boxes.
- Fill in the appropriate oval in each column.

BLOCK G

9. Zip Code

- Write the zip code in the 5 boxes provided.
- Fill in the appropriate oval for each column.

BLOCK H

10. Sex

This is an optional question. If you have no objection, fill in the appropriate oval.

BLOCK I

11. Date of Birth

- Fill in the oval next to the appropriate month.
- Write the day of the month in the two boxes provided. Use a leading zero for all single digit dates.

  EXAMPLE: the 4th would be written 04

- Fill in the appropriate oval in each column.
- Write in the last two digits of the year of your birth in the two boxes provided.
- Fill in the appropriate oval in each column.

BLOCK J

12. Identification Number

Your Social Security Number will be your student identifitication number.

- Write in the 9 digits of your number omitting the hyphens.
- Fill in the appropriate oval in each column.

BLOCK K

13. Name Change

If your name has changed since the last time you entered a record in the Registry, print your former name. If no change has occurred, leave blank.

BLOCK L

14. Race/Ethnic Background

This is an optional question. If you have no objection, fill in the oval next to the appropriate racial/ethnic designation.

HOW TO FILL OUT THE CLASS IDENTIFICATION FORM

Refer to the sample form on the next page.

This form is generally used to transmit a group of Student Data Forms for an entire class. You must fill out this Form even though you are submitting only one (your own) Student Data Form. Some of the information will not be known by you and will be added by the CLENE office.

Ignore the printed instructions that say to send this form to the Iowa City, Iowa address. This form along with the other three in the package should be sent to the Washington, D.C. office.

BLOCK A

1. Registry Officer. Leave blank.
2. Course Name.

   Fill the Course/Activity Title in the same form as used on the Student Data Form.
3. Institution or Sponsor.

   Fill in the name of the Sponsor/Provider of this course/activity. Use the name as it was written on the Sponsor Description Form.

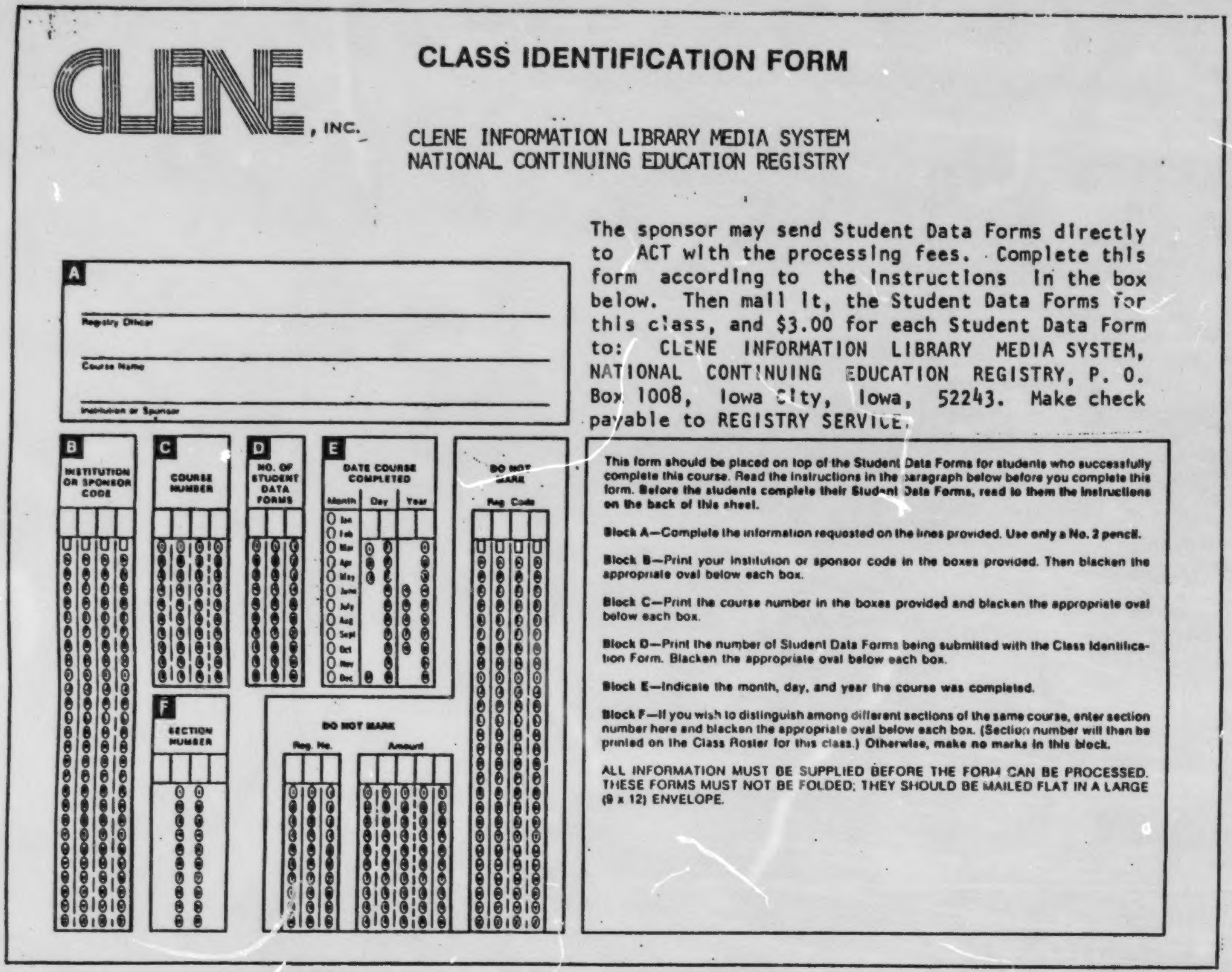
BLOCK B

4. Institution of Sponsor Code. Leave blank.

BLOCK C

5. Course Number.

   - If you filled in a Course Number on the Course/Activity Description Form, write it in the four boxes provided.



CLENE, INC.

CLASS IDENTIFICATION FORM

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY

The sponsor may send Student Data Forms directly to ACT with the processing fees. Complete this form according to the instructions in the box below. Then mail it, the Student Data Forms for this class, and $3.00 for each Student Data Form to: CLENE INFORMATION LIBRARY MEDIA SYSTEM, NATIONAL CONTINUING EDUCATION REGISTRY, P. O. Box 1008, Iowa City, Iowa, 52243. Make check payable to REGISTRY SERVICE.

A

Registry Officer

Course Name

Institution or Sponsor

B INSTITUTION OR SPONSOR CODE

C COURSE NUMBER

D NO. OF STUDENT DATA FORMS

E DATE COURSE COMPLETED

Month | Day | Year

○ Jan
○ Feb
○ Mar
○ Apr
○ May
○ June
○ July
○ Aug
○ Sept
○ Oct
○ Nov
○ Dec

DO NOT MARK

Reg. Code

F SECTION NUMBER

DO NOT MARK

Reg. No.

Amount

This form should be placed on top of the Student Data Forms for students who successfully complete this course. Read the instructions in the paragraph below before you complete this form. Before the students complete their Student Data Forms, read to them the instructions on the back of this sheet.

Block A—Complete the information requested on the lines provided. Use only a No. 2 pencil.

Block B—Print your institution or sponsor code in the boxes provided. Then blacken the appropriate oval below each box.

Block C—Print the course number in the boxes provided and blacken the appropriate oval below each box.

Block D—Print the number of Student Data Forms being submitted with the Class Identification Form. Blacken the appropriate oval below each box.

Block E—Indicate the month, day, and year the course was completed.

Block F—If you wish to distinguish among different sections of the same course, enter section number here and blacken the appropriate oval below each box. (Section number will then be printed on the Class Roster for this class.) Otherwise, make no marks in this block.

ALL INFORMATION MUST BE SUPPLIED BEFORE THE FORM CAN BE PROCESSED. THESE FORMS MUST NOT BE FOLDED; THEY SHOULD BE MAILED FLAT IN A LARGE (9 x 12) ENVELOPE.

- Fill in the appropriate oval in the columns below.

BLOCK D

6. Number of Student Data Forms.

   Write in 001 and fill in the appropriate ovals in each column.

BLOCK E

7. Date Course Completed

   Use the same date that was used on the Student Data Form.

   - Fill in the oval next to the appropriate month.
   - Write the day in the 2 boxes provided. Use a leading zero for a single digit date.

     EXAMPLE: the 3rd would be written 03
   - Fill in the appropriate oval in each column.
   - Write the last two digits of the year in the boxes provided.
   - Fill in the appropriate oval in each column.

BLOCK F

8. Section Number. Leave blank.

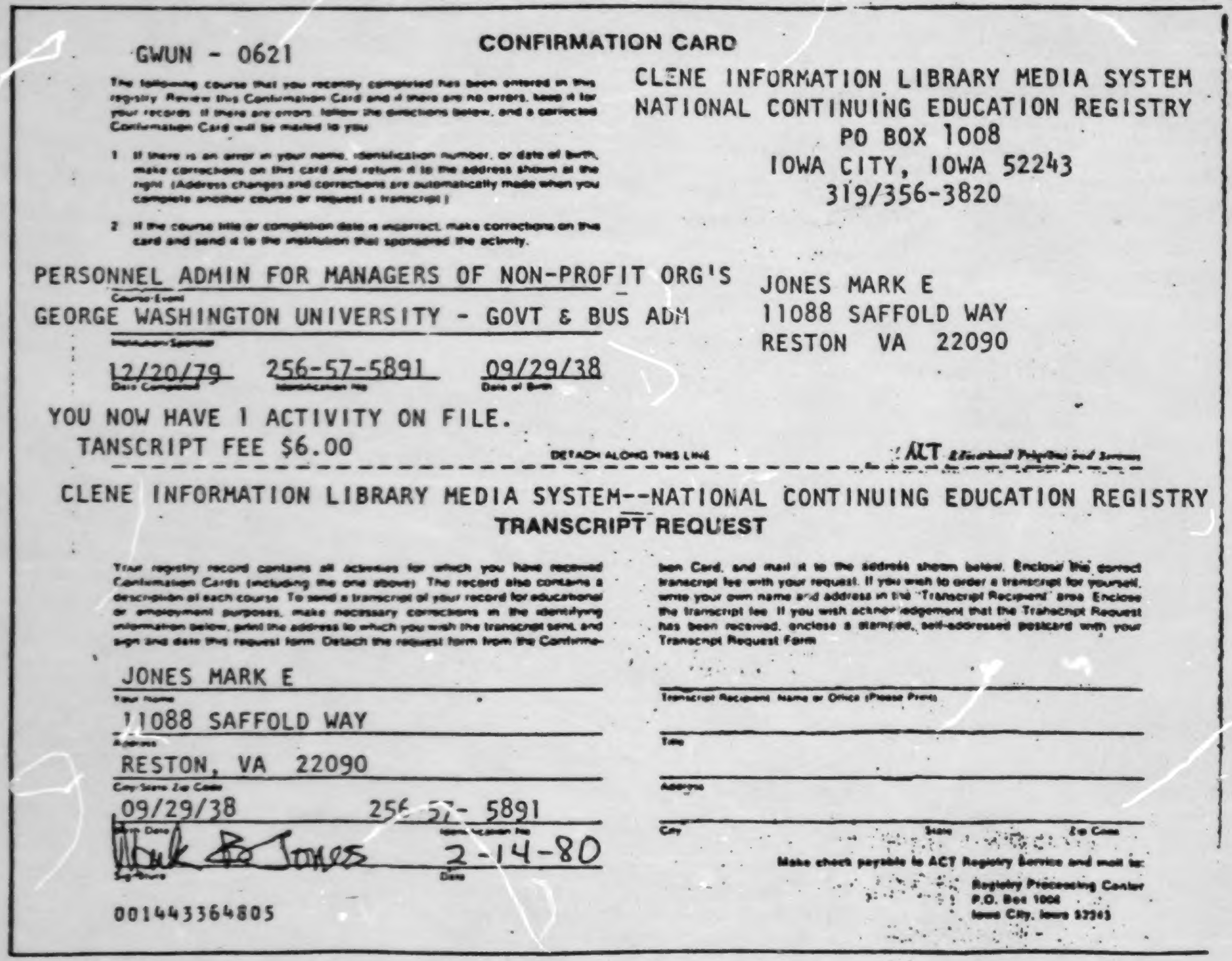
The remainder of the form is for use by the Registry office and should be left blank.

After the record has been created, you will receive in the mail, a Confirmation Card. You may use this card to correct any errors you detect in the data:

1. Errors in your name, identification number, or date of birth should be noted on the card and the card sent to the Iowa City address.

2. Errors in the course title or completion date should be noted and the card sent to the CLENE office in Washington, D.C.

Confirmation Card and Transcript Request



GWUN - 0621

CONFIRMATION CARD

The following course that you recently completed has been entered in the registry. Review this Confirmation Card and if there are no errors, keep it for your records. If there are errors, follow the directions below, and a corrected Confirmation Card will be mailed to you.

1. If there is an error in your name, identification number, or date of birth, make corrections on this card and return it to the address shown at the right. (Address changes and corrections are automatically made when you complete another course or request a transcript.)

2. If the course title or completion date is incorrect, make corrections on the card and send it to the institution that sponsored the activity.

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

PERSONNEL ADMIN FOR MANAGERS OF NON-PROFIT ORG'S
Course-Event

GEORGE WASHINGTON UNIVERSITY - GOVT & BUS ADM
Institution-Sponsor

12/20/79 Date Completed
256-57-5891 Identification No
09/29/38 Date of Birth

JONES MARK E
11088 SAFFOLD WAY
RESTON VA 22090

YOU NOW HAVE 1 ACTIVITY ON FILE.
TANSCRIPT FEE $6.00

DETACH ALONG THIS LINE

ACT Educational Programs and Services

CLENE INFORMATION LIBRARY MEDIA SYSTEM--NATIONAL CONTINUING EDUCATION REGISTRY

TRANSCRIPT REQUEST

Your registry record contains all activities for which you have received Confirmation Cards (including the one above). The record also contains a description of each course. To send a transcript of your record for educational or employment purposes, make necessary corrections in the identifying information below, print the address to which you wish the transcript sent, and sign and date this request form. Detach the request form from the Confirmation Card, and mail it to the address shown below. Enclose the correct transcript fee with your request. If you wish to order a transcript for yourself, write your own name and address in the "Transcript Recipient" area. Enclose the transcript fee. If you wish acknowledgement that the Transcript Request has been received, enclose a stamped, self-addressed postcard with your Transcript Request Form.

JONES MARK E
Your Name

11088 SAFFOLD WAY
Address

RESTON, VA 22090
City-State-Zip Code

09/29/38 Birth Date
256-57-5891 Identification No

Mark B Jones
Signature

2-14-80
Date

001443364805

Transcript Recipient Name or Office (Please Print)

Title

Address

City State Zip Code

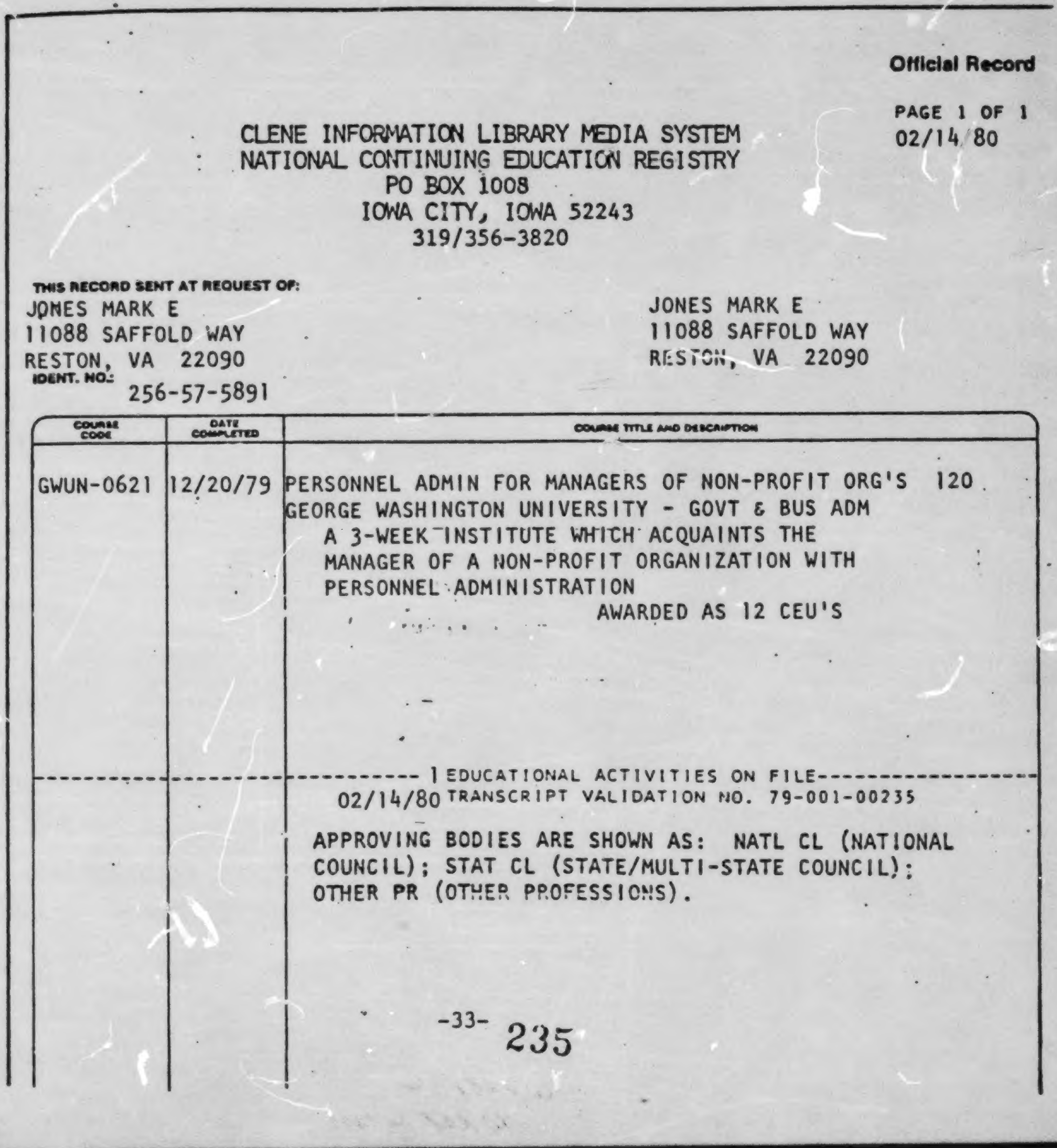
Make check payable to ACT Registry Service and mail to:

Registry Processing Center
P.O. Box 1008
Iowa City, Iowa 52243

On the bottom of the Confirmation Card is a Transcript Request Form. You may fill it out and mail it to the Iowa City address along with a $6.00 check anytime you wish to request a transcript. Only you can request a transcript of your record. You authorize the issuing of the transcript when you sign the form.

You may have the transcript mailed to yourself or to anyone else you designate by filling out the name and address block in the right column of the form.

If you wish to receive an acknowledgement that the Transcript Request has been received, you may enclose a stamped self-addressed postcard with your form.



Official Record

PAGE 1 OF 1
02/14/80

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

THIS RECORD SENT AT REQUEST OF:
JONES MARK E
11088 SAFFOLD WAY
RESTON, VA 22090
IDENT. NO.: 256-57-5891

JONES MARK E
11088 SAFFOLD WAY
RESTON, VA 22090

COURSE CODE	DATE COMPLETED	COURSE TITLE AND DESCRIPTION
GWUN-0621	12/20/79	PERSONNEL ADMIN FOR MANAGERS OF NON-PROFIT ORG'S 120 GEORGE WASHINGTON UNIVERSITY - GOVT & BUS ADM A 3-WEEK INSTITUTE WHICH ACQUAINTS THE MANAGER OF A NON-PROFIT ORGANIZATION WITH PERSONNEL ADMINISTRATION AWARDED AS 12 CEU'S
		1 EDUCATIONAL ACTIVITIES ON FILE
	02/14/80	TRANSCRIPT VALIDATION NO. 79-001-00235
		APPROVING BODIES ARE SHOWN AS: NATL CL (NATIONAL COUNCIL); STAT CL (STATE/MULTI-STATE COUNCIL); OTHER PR (OTHER PROFESSIONS).

HOW TO ENTER INDEPENDENT ACTIVITIES INTO THE CLENE NATIONAL REGISTRY

If you have undertaken some continuing education activities independently, that is, not under the auspices of a Sponsor/Provider, you can enter these activities into the CLENE National Continuing Education Registry. You must initiate the action and prepare all of the paperwork.

The first time you enter independent activities, you must start with Step 1. All subsequent times (after you have been assigned a Sponsor Code), you can just write to the CLENE Recognition Service and request a Form Package for Individual Activities and upon receipt start with Step 3.

Step 1. Write to CLENE, Inc. and request a Sponsor Description Form. The address is:

CLENE Recognition Service
620 Michigan Avenue, N.E.
Washington, D.C. 20064

Step 2. Complete the Sponsor Description Form according to the instructions that follow. You will be considered your own Sponsor and will be entered into the Registry as such. Return the completed Form to the CLENE office in Washington, D.C.

Step 3. The CLENE office will assign a Sponsor Code for you to use for this and all future activities you wish to record in the CLENE Registry. You will also receive a Form Package for Independent Activities which will include:

1. Course/Activity Description Form
2. Student Data Form
3. Class Identification Form

Complete each form as shown in the instructions that follow; prepare a check for the entrance fee of $3.00 made payable to REGISTRY SERVICE; and mail the forms and checks to:

CLENE Information Library Media System
National Continuing Education Registry
P. O. Box 1008
Iowa City, Iowa 52243

DO NOT BEND OR FOLD THE FORMS. They should be mailed flat in a large (9 x 12) envelope.

Step 4. You will receive a Class Roster and a confirmation card to show your record has been created in the CLENE National Registry. Check the information for errors.

BEST COPY AVAILABLE

SPONSOR DESCRIPTION FORM

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY

Your Registry number
(Assigned at time of participation)

0

SPONSOR CODE

A - Add
C - Change
D - Delete

TYPE

SPONSOR NAME

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

ZIP CODE

SPONSOR REGISTRY OFFICER

TITLE

BY ____________________

DATE ____________________

ACT

ENTERED ____________________ VERIFIED ____________________ CHECKED ____________________

DATE ____________________ DATE ____________________ DATE ____________________

BEST COPY AVAILABLE

HOW TO FILL OUT THE SPONSOR DESCRIPTION FORM

Refer to the sample form on the facing page.

You will fill out only a portion of this Form. The additional information will be provided by the CLENE office.

Sponsor Code:	Leave blank.
A=Add C=Change D=Delete	Leave blank.
Type:	Fill in the number "9."
Sponsor Name:	You are the Sponsor/Provider and your name will be written on this line in inverted order: write your last name--leave a space (one blank compartment)--then write your first name. If you wish to use a middle name or initial and if there are enough spaces, leave a space after your first name and write it in. There cannot be more than 30 characters used on this line including letters and spaces. EXAMPLE: JONES PHYLLIS E
Address:	You have two lines on which to write your address. Again you cannot put more than one character (letter, number, or punctuation mark) per compartment. Leave a space (blank compartment) wherever needed for reading ease.
City:	Write in the city on the line indicated.
State:	Fill in the two-letter abbreviation for your state where indicated.
Zip Code:	Fill in the zip code where indicated.
Sponsor Registry Officer:	You will be your own Registry Officer. Fill in your name but do not invert it. Just write in your first name--leave a space--then your last name with one letter or space per compartment. If you wish to use a middle name or initial and there are sufficient compartments available, you may write it in leaving a space on each side. EXAMPLE: PHYLLIS E JONES
Title:	Write the word "Individual" on this line.

The remainder of the form is for use by the Registry office and should be left blank.

CLENE
CONTINUING LIBRARY
EDUCATION NETWORK
AND EXCHANGE

CLENE Information Library Media System
National Continuing Education Registry

Course Form

Office Use
0 0 9
Action

Instructions: Complete all information. Please type or print clearly.

CHECK ONE:

This is a:
- ☐ New course or activity (Version Number "01"—Course Number not previously on Registry file.)
- ☐ New version of a course already on file. (Use next sequential Version Number. Previous version will no longer be active, but will be kept on file with no change in description data.)
- ☐ Revision of a Course Form previously submitted to Registry. (The description data for the version you specify will be revised using the information on this form.)

Effective Date: Month Day Year — The completion dates for this version of this course must be after this date.

Institution: Code (assigned by the Registry) — Institution Name

Start — Elite Stop — Pica Stop

Course: Course Number (permanent course number assigned by sponsor) — Course Title (50 characters maximum)

Note that a new version for a course closes the earlier version. ("Version Number" refers to a course, not a section. If you wish to distinguish different sections of a course, use "Section Number" on the Class Form, not "Version Number.")

Version: Version Number

Course Description:

Line 1 (50 characters maximum)

Line 2 (50 characters maximum)

Line 3 (50 characters maximum)

Line 4 (50 characters maximum) (Indicate credit, CEU value, etc., on this line)

Type of Course:

1 = Classroom/Formal Group Instruction (Includes short course)
2 = Academic Independent Study
3 = Practicum/Internship
4 = Institute/Seminar/Workshop (Includes specific conference program)
5 = Home Study/Correspondence Course
6 = Electronically-delivered Programs
7 = Self-instructional Programs
8 = Papers, Publications, Books
9 = Study/Discussion Groups (Includes lecture series, journal clubs, etc.)
0 = Other

Subject: Subject Code — Use 0000 for undetermined or blank. A list of subject codes is available from CLENE.

Measure of Activity: Quantity of Contact Hours . (Tenths) — Approving Body

Approving Bodies are:
NATL CL
STAT CL
OTHER PR

This form was completed by:

Signature

Name

Title

Mail completed form to:

CLENE Information Library Media System
National Continuing Education Registry
P.O. Box 1008
Iowa City, Iowa 52243

Signature of Registry Officer — Date

Name of Registry Officer

The American College Testing Program

HOW TO FILL OUT THE COURSE/ACTIVITY DESCRIPTION FORM

Refer to the sample form on the facing page.

This is a: Put an "X" in the box next to New Course.

Effective Date:

- o If the activity was a one-day occurrence, use the day before as the Effective Date. The day of the occurrence will be used as the Completion Date on the Forms that follow.
- o If the activity was presented over more than one day, use the day the activity began as the Effective Date.

The date must be written as month-day-year expressed as two-digits each. When a month or day is a single digit, a leading zero must be used.

EXAMPLE: February 9, 1980 –

0,2	0,9	8,0
Month	Day	Year

Sponsor:

Code Enter the four character code supplied by the CLENE office.

Name Fill in your name as the Sponsor/Provider of this activity. (This name should be the same as the Sponsor's Name on the Sponsor Description Form.)

Course:

Number This will just be a running number which will represent the number of independent activities you have entered. The first will be 0001, the second will be 0002, and so on.

Course/Activity Title

Provide a title for your activity that will be meaningful to others. There is a limit of 50 characters, including letters and spaces.

NOTE: This form was designed to aid persons who type the information. If the typing is begun at the left of the line, the lines at the right end mark the end of fifty positions. The first mark is for elite typewriters--12 characters to the inch. The second mark is for pica typewriters--10 characters to the inch. Persons who fill the form in by hand must count the characters used.

EXAMPLE:

Start Elite Stop Pica Stop

Course/Activity Title (50 characters maximum)

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Version: Fill in "01."

Course/Activity Description:

These four lines can be used to describe the activity: its nature, objectives, subject areas, scope, and/or length. There is a limit of 50 characters per line (inlcuding letters, numbers, spaces, and punctuation marks.)

- The last 25 positions of the fourth line are reserved for information on the unit of measure for the activity. Since no units were awarded, leave the last 25 positions blank.

Type of Learning Activity:

Select the number for the category that best describes the type of learning activity for this activity. Type "0" will probably apply in this case and "8" could also apply. The other categories will not apply.

Subject: A four digit HEGIS code should be selected and filled in here. *(The Expanded HEGIS Subject Code list is included in the Form Package.)* Choose the code that best describes the overall subject content and scope of the activity.

Measure of Activity:
Quantity of Contact Hours

The standard measure for all activities entered into the CLENE National Registry is the contact hour. All other units of measure must be converted using the Conversion Chart *(included in the Form Package)* so that the values will be standard. Look up the Type of Activity, compute the contact hours, and fill in the compartments. The time can be expressed in tenths of an hour if necessary.

EXAMPLE:

1 hour and thirty minutes

Measure of Activity | | | 1 | . | 5 |
Quantity of Contact Hours (Tenths)

35 hours

Measure of Activity | | 3 | 5 | . | 0 |
Quantity of Contact Hours (Tenths)

Approving Body: Leave blank.

This form was completed by:

Signature: Sign your name.

Name: Fill in your name by printing or typing it.

241

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Title: Fill in "Individual."

Signature of Registry Officer:

Sign your name.

Name of Registry Officer:

Fill in your name as it appeared on the Sponsor Description Form.

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BEFORE FILLING OUT YOUR STUDENT FORM. . . . .

To make sure that your record is correct and that your Confirmation Card will reach you at your home address, your Student Form must be complete and accurate. Before beginning, please take a moment to read these five reminders:

Use pencil only	Inks (including ball point) are invisible to the scanning machine that "reads" this form. Your form cannot be processed unless you use a **pencil.**
Fill in the ovals completely	Every time your print a number or letter in one of the boxes, you must fill in one of the ovals in the column beneath it. Fill in the entire oval; **don't** just use a check-mark or an "X." The machine reads these blackened ovals.
Enter last name first	In block C, give your last name first, followed by your first name. Otherwise, your record will appear out of sequence.
Leave a space between words	In blocks C, D, and E, leave a space (that is, a blank box) between words or groups of numbers. Blacken the small rectangle directly beneath **every** box you leave blank. If your name or city is hyphenated, enter the hyphen in the appropriate box and then blacken the "-" oval beneath the "Z" oval in that column.
Make sure the form is clean and undamaged . . .	A form that is smudged, torn, folded, or stapled cannot be processed. If your form is smudged or damaged, ask for a new one. If you've already entered information on the damaged form, be sure to transfer it to the new form.

THANK YOU!

N

**IF YOUR ADDRESS
IS NOT IN THE UNITED STATES,
PLEASE PRINT YOUR MAILING ADDRESS
ON THE LINES BELOW.**

House Number and Street

City, State or Province, and Postal Code

Country

FORM NO. 7380

STUDENT FORM

A I authorize the submission of this form and of other information about my participation in this course to ACT, which will record and maintain this information.

Name of Course (Please Print)

Signature (Do Not Print) Date

B **Please mark one response to each of these statements.**

A = Agree
NU = Neutral/Undecided
D = Disagree

A	NU	D	
○	○	○	Objectives of course or workshop were clear
○	○	○	Concepts, activities, and materials met the objectives
○	○	○	Instructor understood thoroughly the material covered
○	○	○	Instructor's presentation was clear and well organized
○	○	○	This course or workshop was helpful

STATE CODE LIST

Ala.	01
Alaska	02
Ariz.	03
Ark.	04
Calif.	05
Colo.	06
Conn.	07
Del.	08
D.C.	09
Fla.	10
Ga.	11
Hawaii	12
Idaho	13
Ill.	14
Ind.	15
Iowa	16
Kans.	17
Ky.	18
La.	19
Maine	20
Md.	21
Mass.	22
Mich.	23
Minn.	24
Miss.	25
Mo.	26
Mont.	27
Nebr.	28
Nev.	29
N.H.	30
N.J.	31
N.Mex.	32
N.Y.	33
N.C.	34
N.Dak.	35
Ohio	36
Okla.	37
Oreg.	38
Pa.	39
R.I.	40
S.C.	41
S.Dak.	42
Tenn.	43
Tex.	44
Utah	45
Vt.	46
Va.	47
Wash.	48
W.Va.	49
Wis.	50
Wyo.	51
Canada	53*
All Other	55*

*See Other Side

C **NAME (Last Name First)**
(Note: Use a Soft Lead Pencil Only)

D **HOUSE NUMBER AND STREET "PO BOX" AND NUMBER, "RR" AND NUMBER**

E **CITY**
(Do Not Enter State in This Area)

F **STATE CODE**

G **ZIP CODE**

H **SEX (Optional)**

Female ○

Male ○

I **DATE OF BIRTH**

Month Day Year

○ Jan.
○ Feb.
○ Mar.
○ Apr.
○ May
○ June
○ July
○ Aug.
○ Sept.
○ Oct.
○ Nov.
○ Dec.

J **IDENTIFICATION NUMBER**

K If your name has changed since your last submission to the Registry, print your former name below.

Please Print

L **RACIAL/ETHNIC BACKGROUND (Optional)**

○ Hispanic
○ American Indian or Alaskan Native
○ Asian or Pacific Islander
○ Black/Negro, not Hispanic
○ Caucasian/White, not Hispanic

M **SPECIAL USE AREA**

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HOW TO FILL OUT THE STUDENT DATA FORM

Refer to the sample form on the facing page.

BLOCK A

1. Name of Course

   Use the title of the course as indicated on the Course/Activity Description Form.

2. Sign your name using your regular signature. This authorizes the CLENE National Registry to create a record for you.

3. Fill in the date the activity was completed. If the activity occurred on only one day, use that date as the Completion Date.

BLOCK B

4. These 5 statements represent your evaluation of the activity. Because this was designed for group offerings, it does not apply well to independent activities. You may wish to fill in NU for all statements. Fill in the appropriate oval for each statement.

BLOCKS C, D, AND E

Your name, address, and city are to be entered here using the following rules:

- Fill in only one character per box.
- Leave a space between words or groups of numbers by leaving a box blank (empty).
- Every time you print a number or letter in one of the boxes, you must fill in the appropriate oval in the column beneath it.
- When you leave a box blank (a space), fill in the rectangle directly beneath that box.
- No punctuation marks may be used except for hyphens. When a name or city is hyphenated, fill in the oval beneath the "Z" oval in that column.
- Be sure to fill in the entire oval or rectangle. A check-mark or an "X" will not be read by the computer scanner.

5. Name

   - Enter your last name first.
   - Leave one space.
   - Enter your first name or first initial.
   - Leave one space.
   - Enter your middle name or initial.
   - There can not be more than 26 characters (letters and spaces) entered for your name.
   - If you use less than 26 boxes, fill in the rectangle for all of columns with blank boxes.

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6. Mailing Address

- Enter your address expressed as:

  house number and street OR
  post office box and number OR
  rural route and number

- You may enter "½" in one box but no other fraction can be expressed.

7. City

Enter the name of your city but not the state.

BLOCK F

8. State

- Select the appropriate state code (a two digit code) from the list along the left margin of the Form.

  EXAMPLE: Virginia is 47.

- Fill in the number in the two boxes.
- Fill in the appropriate oval in each column.

BLOCK G

9. Zip Code

- Write the zip code in the 5 boxes provided.
- Fill in the appropriate oval for each column.

BLOCK H

10. Sex

This is an optional question. If you have no objection, fill in the appropriate oval.

BLOCK I

11. Date of Birth

- Fill in the oval next to the appropriate month.
- Write the day of the month in the two boxes provided. Use a leading zero for all single digit dates.

  EXAMPLE: the 4th would be written 04

- Fill in the appropriate oval in each column.
- Write in the last two digits of the year of your birth in the two boxes provided.
- Fill in the appropriate oval in each column.

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BLOCK J

12. Identification Number

Your Social Security Number will be your student identification number.

- Write in the 9 digits of your number omitting the hyphens.
- Fill in the appropriate oval in each column.

BLOCK K

13. Name Change

If your name has changed since the last time you entered a record in the Registry, print your former name. If no change has occurred, leave blank.

BLOCK L

14. Race/Ethnic Background

This is an optional question. If you have no objection, fill in the oval next to the appropriate racial/ethnic designation.

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CLASS IDENTIFICATION FORM

CLENE, INC.

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY

The sponsor may send Student Data Forms directly to ACT with the processing fees. Complete this form according to the instructions in the box below. Then mail it, the Student Data Forms for this class, and $3.00 for each Student Data Form to: CLENE INFORMATION LIBRARY MEDIA SYSTEM, NATIONAL CONTINUING EDUCATION REGISTRY, P. O. Box 1008, Iowa City, Iowa, 52243. Make check payable to REGISTRY SERVICE.

A

Registry Officer

Course Name

Institution or Sponsor

B INSTITUTION OR SPONSOR CODE

C COURSE NUMBER

D NO. OF STUDENT DATA FORMS

E DATE COURSE COMPLETED

Month | Day | Year

○ Jan
○ Feb
○ Mar
○ Apr
○ May
○ June
○ July
○ Aug
○ Sept
○ Oct
○ Nov
○ Dec

DO NOT MARK

Reg. Code

F SECTION NUMBER

DO NOT MARK

Reg. No. | Amount

This form should be placed on top of the Student Data Forms for students who successfully complete this course. Read the instructions in the paragraph below before you complete this form. Before the students complete their Student Data Forms, read to them the instructions on the back of this sheet.

Block A—Complete the information requested on the lines provided. Use only a No. 2 pencil.

Block B—Print your institution or sponsor code in the boxes provided. Then blacken the appropriate oval below each box.

Block C—Print the course number in the boxes provided and blacken the appropriate oval below each box.

Block D—Print the number of Student Data Forms being submitted with the Class Identification Form. Blacken the appropriate oval below each box.

Block E—Indicate the month, day, and year the course was completed.

Block F—If you wish to distinguish among different sections of the same course, enter section number here and blacken the appropriate oval below each box. (Section number will then be printed on the Class Roster for this class.) Otherwise, make no marks in this block.

ALL INFORMATION MUST BE SUPPLIED BEFORE THE FORM CAN BE PROCESSED. THESE FORMS MUST NOT BE FOLDED; THEY SHOULD BE MAILED FLAT IN A LARGE (9 x 12) ENVELOPE.

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HOW TO FILL OUT THE CLASS IDENTIFICATION FORM

Refer to the sample form on the facing page.

This form is generally used to transmit a group of Student Data Forms for an entire class. You must fill out this Form even though you are submitting only one (your own) Student Data Form.

BLOCK A

1. Registry Officer. Write your name.

2. Course Name. Fill the Course/Activity Title in the same form as used on the Student Data Form.

3. Institution or Sponsor.

   Fill in your name as the Sponsor/Provider of this activity as it was written on the Sponsor Description Form.

BLOCK B

4. Institution or Sponsor Code.

   Write in your four letter Sponsor Code in the boxes provided.

   Fill in the appropriate ovals in each column beneath the boxes.

BLOCK C

5. Course Number.

   Write in the Course Number used on the Course/Activity Description Form in the four boxes provided.

   Fill in the appropriate oval in the columns below.

BLOCK D

6. Number of Student Data Forms.

   Write in 001 and fill in the appropriate ovals in each column.

BLOCK E

7. Date Course Completed.

   Use the same date that was used on the Student Data Form.

   - o Fill in the oval next to the appropriate month.
   - o Write the day in the 2 boxes provided. Use a leading zero for a single digit date.

     EXAMPLE: the 8th would be written 08

   - o Fill in the appropriate oval in each column.
   - o Write the last two digits of the year in the boxes provided.
   - o Fill in the appropriate oval in each column.

BLOCK F

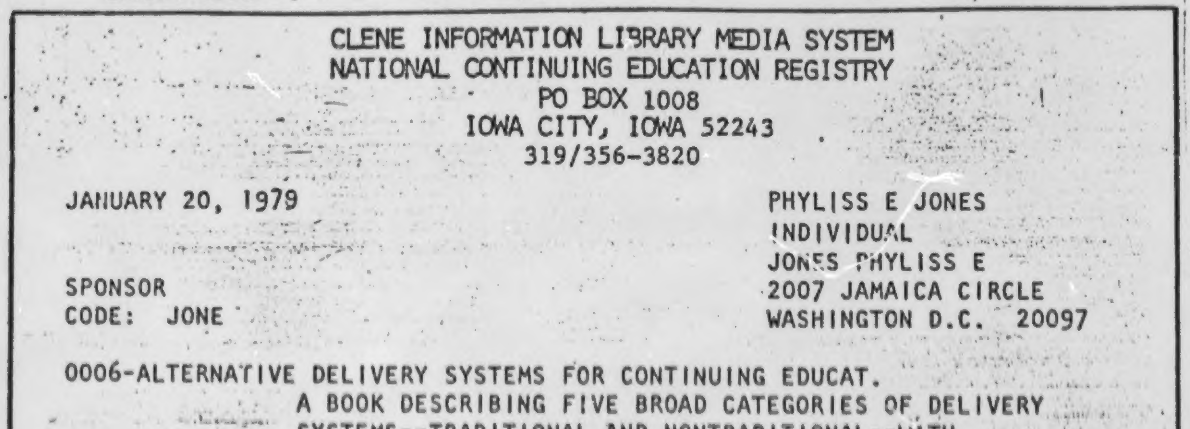
8. Section Number. Leave blank.

The remainder of the form is for use by the Registry office and should be left blank.

Once your forms have been received in Iowa City, Iowa they will be processed. After the record has been created, you receive in the mail, a Confirmation Card and a Class Roster.

The Class Roster is sent to all Sponsors to verify the information entered: the correct students for the correct course/activity. It also gives the Sponsor the results of the student evaluations. As you are considered the Sponsor of your independent activities, you receive a Class Roster.

Class Roster



CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

JANUARY 20, 1979

PHYLISS E JONES
INDIVIDUAL
JONES PHYLISS E
2007 JAMAICA CIRCLE
WASHINGTON D.C. 20097

SPONSOR
CODE: JONE

0006-ALTERNATIVE DELIVERY SYSTEMS FOR CONTINUING EDUCAT.
A BOOK DESCRIBING FIVE BROAD CATEGORIES OF DELIVERY
SYSTEMS--TRADITIONAL AND NONTRADITIONAL--WITH
SPECIAL EMPHASIS ON MARKETING, COAUTHOR: M. SMITH.
WORLD PRESS, 1979.

ACCORDING TO OUR RECORDS, THE FOLLOWING STUDENTS COMPLETED THE
ABOVE COURSE ON 01/08/79. PLEASE INFORM US AT ONCE IF THERE
ARE ANY ERRORS.

```
          432-42-9078     JONES PHYLISS E

THE STUDENT RESPONSES TO THE COURSE EVALUATION ITEMS WERE--

                          PERCENTAGES OF THIS CLASS
      ITEM             AGREED    NEUTRAL    DISAGREED    OMITTED

  OBJECTIVES CLEAR        0        100          0           0
  MET OBJECTIVES          0        100          0           0
  INST KNEW MATERIAL      0        100          0           0
  PRESENTATION CLEAR      0        100          0           0
  COURSE HELPFUL          0        100          0           0
```

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The Confirmation Card is sent to every student to verify the information entered. You may use this card to correct any errors you detect in the data: your name, identification number, date of birth, course title, or completion date. Note the errors and make the corrections on the Confirmation Card and send it to the Iowa City, Iowa address.

Confirmation Card and Transcript Request

CONFIRMATION CARD

JONE-0006

The following course that you recently completed has been entered in this registry. Review this Confirmation Card and if there are no errors, keep it for your records. If there are errors, follow the directions below, and a corrected Confirmation Card will be mailed to you.

1. If there is an error in your name, identification number, or date of birth, make corrections on this card and return it to the address shown at the right. (Address changes and corrections are automatically made when you complete another course or request a transcript.)
2. If the course title or completion date is incorrect, make corrections on the card and send it to the institution that sponsored the activity.

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

ALTERNATE DELIVERY SYSTEMS FOR CONTINUING EDUCAT.
Course-Event

JONES PHYLISS E
Institution Sponsor

01/08/79 Date Completed
432-42-9078 Identification No
07/07/30 Date of Birth

JONES PHYLISS E
2007 JAMAICA CIRCLE
WASHINGTON D.C. 20097

YOU NOW HAVE 1 ACTIVITY ON FILE.
TRANSCRIPT FEE $6.00

DETACH ALONG THIS LINE

ACT Educational Programs and Services

CLENE INFORMATION LIBRARY MEDIA SYSTEM--NATIONAL CONTINUING EDUCATION REGISTRY

TRANSCRIPT REQUEST

Your registry record contains all activities for which you have received Confirmation Cards (including the one above). The record also contains a description of each course. To send a transcript of your record for educational or employment purposes, make necessary corrections in the identifying information below, print the address to which you wish the transcript sent, and sign and date this request form. Detach the request form from the Confirmation Card, and mail it to the address shown below. Enclose the correct transcript fee with your request. If you wish to order a transcript for yourself, write your own name and address in the "Transcript Recipient" area. Enclose the transcript fee. If you wish acknowledgement that the Transcript Request has been received, enclose a stamped, self-addressed postcard with your Transcript Request Form.

JONES PHYLISS E
Your Name

2007 JAMAICA CIRCLE
Address

WASHINGTON D.C. 20097
City State Zip Code

07/07/30 Birth Date
432-42-9078 Identification No

Phyliss E. Jones
Signature
2-11-80
Date

001443364805

Transcript Recipient Name or Office (Please Print)

Title

Address

City State Zip Code

Make check payable to ACT Registry Service and mail to:
Registry Processing Center
P.O. Box 1008
Iowa City, Iowa 52243

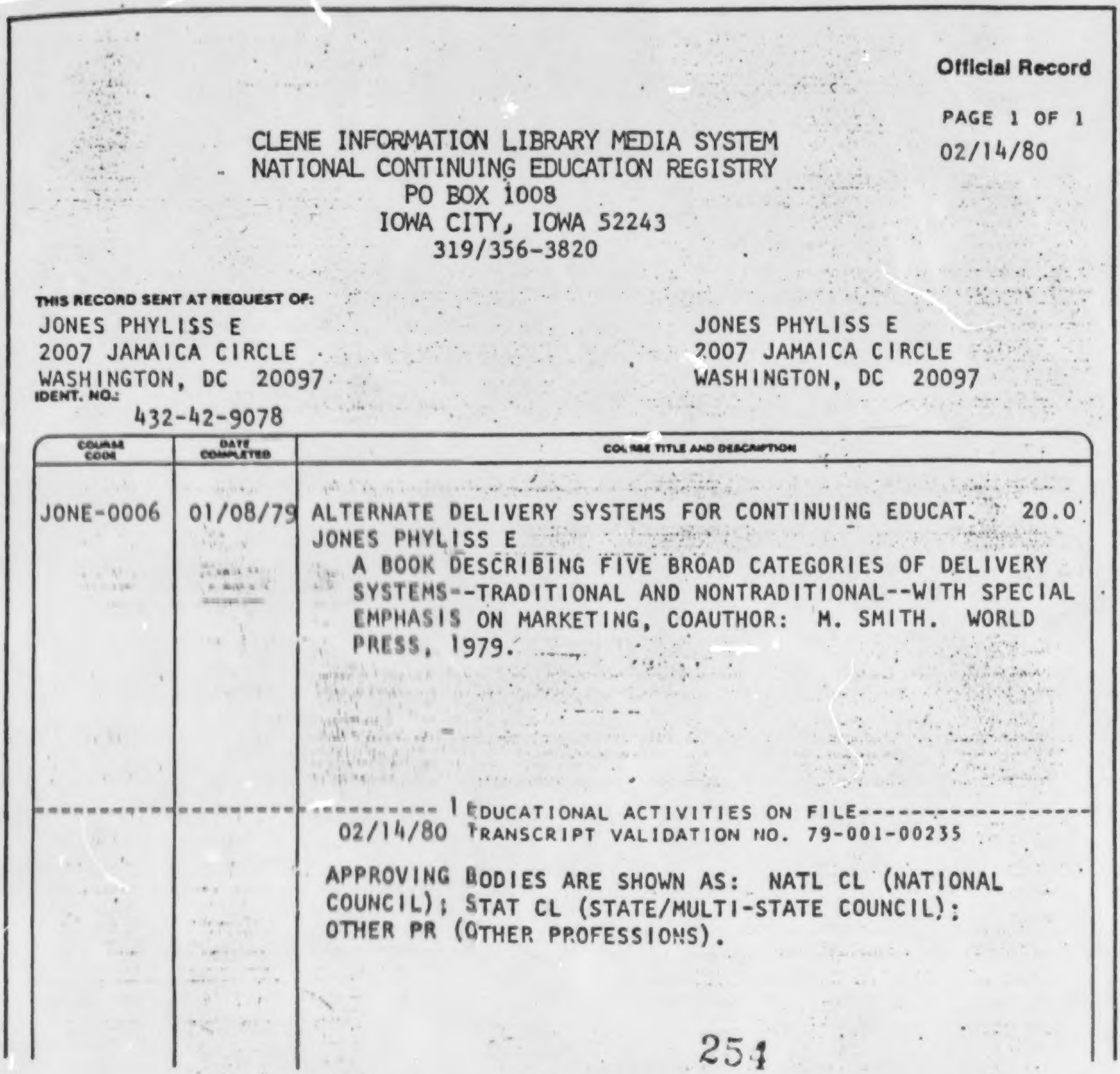
TRANSCRIPT FEE $6.00

BEST COPY AVAILABLE

On the bottom of the Confirmation Card is a Transcript Request Form. You may fill it out and mail it to the Iowa City address along with a $6.00 check anytime you wish to request a transcript. Only you can request a transcript of your record. You authorize the issuing of the transcript when you sign the form.

You may have the transcript mailed to yourself or to anyone else you designate by filling out the name and address block in the right column of the form.

If you wish to receive an acknowledgement that the Transcript Request has been received, you may enclose a stamped, self-addressed postcard with your form.



Official Record

PAGE 1 OF 1
02/14/80

CLENE INFORMATION LIBRARY MEDIA SYSTEM
NATIONAL CONTINUING EDUCATION REGISTRY
PO BOX 1008
IOWA CITY, IOWA 52243
319/356-3820

THIS RECORD SENT AT REQUEST OF:

JONES PHYLISS E
2007 JAMAICA CIRCLE
WASHINGTON, DC 20097

JONES PHYLISS E
2007 JAMAICA CIRCLE
WASHINGTON, DC 20097

IDENT. NO.: 432-42-9078

COURSE CODE	DATE COMPLETED	COURSE TITLE AND DESCRIPTION
JONE-0006	01/08/79	ALTERNATE DELIVERY SYSTEMS FOR CONTINUING EDUCAT. 20.0 JONES PHYLISS E A BOOK DESCRIBING FIVE BROAD CATEGORIES OF DELIVERY SYSTEMS--TRADITIONAL AND NONTRADITIONAL--WITH SPECIAL EMPHASIS ON MARKETING, COAUTHOR: M. SMITH. WORLD PRESS, 1979.
		1 EDUCATIONAL ACTIVITIES ON FILE
	02/14/80	TRANSCRIPT VALIDATION NO. 79-001-00235
		APPROVING BODIES ARE SHOWN AS: NATL CL (NATIONAL COUNCIL); STAT CL (STATE/MULTI-STATE COUNCIL); OTHER PR (OTHER PROFESSIONS).

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HOW TO QUALIFY FOR A STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

COMPLETING THE APPLICATION FOR THE STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

Your application for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION is based on your continuing information, library, media education activities for the three years immediately preceding the date of your signature on the application form, which is attached to this booklet. ONLY activities within this period can be accepted.

Application for the STATEMENT OF ACKNOWLEDGEMENT is voluntary. The Statement is based on a 3-year cycle. In order to qualify, an applicant must accumulate 120 contact hours within a 3-year period, of which 40 must be in Category 1. The remaining 80 hours may be in Category 1, or in any combination of categories within the contact hour limitations specified for each category. It is not necessary to have hours in all categories.

Each year CLENE publishes a Directory of Continuing Education Opportunities. This reference is a useful source to individuals in planning their continuing education, and in identifying courses which have been approved as meeting the "Criteria for Quality."

No application fee is charged for CLENE members. The application fee for non-members of CLENE is $15.00. This fee pays part of the cost of administering the Recognition Program.

Categories for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

Category	Description	Contact Hour Limit
1.	All activities "approved" by the National Council on Quality Continuing Education or approved State or Multistate Councils of Continuing Education. This includes approval of an organization for its total program, approval of a single offering, and programs planned in concert with an approved Learning Consultant. Important note: For the calendar year 1980 and before activities that were awarded academic credit or Continuing Education Units (CEU's) may be entered into this category.	No Limit (40 contact hour minimum)
2.	Academic credits and CEU activities with Non-Approved Sponsorship	40 hours
3.	Informal Group Activities	30 hours
4.	Informal Individual Activities (15 contact hour limit in each sub-category as outlined on page 13)	30 hours
5.	Papers, Publications, Books, Exhibits, Consulting, Teaching	40 hours
6.	Association Activities	20 hours
7.	Other Meritorious Learning Experiences	20 hours

CATEGORY 1: CONTINUING EDUCATION ACTIVITIES WITH APPROVED SPONSORSHIP

A minimum of 40 contact hours in this category is required for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION; however, all 120 contact hours may be earned here.

In order to meet the criteria for Category 1, a continuing education activity must:

1.1 Be offered by a provider approved by the National Council on Quality Continuing Library Education or an approved State Council or Multistate Council. Approval is granted to: organizations for their total continuing education programs; to providers for single offerings; and to Learning Consultants.

1.2 For the calendar year 1980, and before, activities that were awarded either academic credit or Continuing Education Units (CEU's) may be entered into this category. Starting in 1981, only activities approved by the National Council or approved State Councils or Multistate Councils may be earned in this category.

1.3 Continuing education activities carried out as a part of a planned individual learning program under the direction of of an approved Learning Counsultant may be claimed in this category.

CATEGORY 2: CONTINUING EDUCATION ACTIVITIES WITHOUT APPROVED SPONSORSHIP

There is a limit of 40 contact hours in category 2.

Credit in Category 2 may be claimed for continuing education activities for which either academic credit or CEU's have been granted by providers who have not been approved by the National Council or an approved State Council or Multistate Council. Credit may also be granted in this category for activities taken outside the fields of information, library, media education, provided it is relevant (for example, management courses taken at business schools).

CATEGORY 3: INFORMAL GROUP ACTIVITIES

There is a limit of 30 contact hours for Category 3.

This category includes learning activities in a group mode which do not have the formal structure of activities included in Categories 1 and 2 and/or for which no academic credit or CEU's have been awarded. It includes, but is not limited to, activities such as:

3.1 Information, Library, Media Association Programs which are planned with specific objectives for target audiences and which involve evaluation of the program presented.

Participants who wish to claim Association programs, pre-conference workshops, etc. in this category must document their participation including: provider, title and description of objectives and content, date(s), location, and number of contact hours. If the Association awarded CEU's for participation to the applicant, it should be entered in Category 2.

CATEGORY 3: INFORMAL GROUP ACTIVITIES (continued)

3.2 Journal Clubs

Journal Club activity consists of discussing preassigned articles from professional journals by members of the club. (Suggested number of articles per session: 5-10.)

3.3 Lecture Series

Attendance at pre-planned lecture series around specific topics, with stated objective(s), and with an evaluation process included may be claimed in Category 3. Documentation should be submitted with with application form including: provider, title and description of content, date(s), location, and number of contact hours.

3.4 Study Groups

This type of activity consists of pre-planned programs which provide for group participation on specific and limited topics on which participants have made preparation before group meetings. (Suggested group size: 3-10 persons.)

Participants in study groups must document their participation including: provider, title and/or description of content, date(s), location, and number of contact hours.

3.5 Workshops, Seminars, Institutes

Workshops, seminars, and institutes which are planned, coordinated, administered, and evaluated in terms of learning objectives, but for which no academic credit or CEU's have been awarded, should be claimed in Category 3.

CATEGORY 4: INFORMAL INDIVIDUAL ACTIVITIES

There is a limit of 30 contact hours for the total of all contact hours in Category but there is a limit of 15 contact hours in each sub-category.

Credit may be claimed in Category 4 for continuing education activities that are not directly supervised.

This category includes individual learning activities for which no academic credit o CEU's are awarded. If a self-instruction program is offered by a provider that give academic credit or CEU's for successful completion, the activity may be included in Category 2; if the self-instruction program has been approved as a single offering, it may be claimed in Category 1. An example might be a home study program.

If the self-instruction program has been pursued under the direct guidance of an approved Learning Consultant, it may also be claimed in Category 1.

Note that within Category 4, not more than 15 contact hours may be claimed in any one of the sub-categories.

CATEGORY 4: INFORMAL INDIVIDUAL ACTIVITIES (continued)

Examples of individual learning materials and/or activities include:

4.1 Pre-planned programs using audiovisual materials, such as videotapes, audiotapes, films, filmstrips, slides, etc. used individually without direct supervision.

4.2 Pre-planned instruction using interactive technologies such as telephone networks, open or closed circuit television, talk-back TV.

4.3 Programmed continuing education materials and teaching devices, such as computers.

4.4 Personal reading of information, library, media publications such as journals, papers, technical reports, research studies, etc. To claim in this category, full bibliographical reference must be given and an abstract of the content submitted.

4.5 Newspaper courses.

4.6 Self-assessment. Time may be claimed for taking self-assessment examinations. To be acceptable, the examination must be scored and the results make known to the participants so they may plan continuing education programs based on the continuing education needs so identified. Continuing education activities done by an individual in preparation for a self-assessment examination or later on the basis of the results of a self-asessment examination shoul be claimed in the category for which they are designated or for which they qualify.

4.7 Tutorial/Consultation. Learning a practitioner receives from a consultant can be accepted in this category provided the consultation is expanded to meet the definition of a planned program of continuing education. The learning a practitioner receives from a consultant may be substantial, as in the case of building or renovating of facilities, provided there is an organized review of current knowledge relating to a particular problem. The instructional period should not be less than one hour, and not more than one hour can be claimed for each consultation, even though the instructional period may last longer. In recording the information the name of the consultant(and the topic discussed should be given. The consultant or instructor may claim credit in Category 5, subject to the 40 contact hour limitation of Category 5.

4.8 Home Study or Correspondence Courses.
If academic credit or CEU's are given by the provider of home study or correspondence courses, they may be claimed in Category 2. If they have been approved as single offerings they may be claimed in Category 1.

4.9 Independent Study.

If independent study is taken in an academic setting and credit or CEU's are given, the item should be listed under Category 2, unless it qualifies for "approved status" and then it should be listed in Category 1. The subject of the independent study, objectives, and outline of content should be submitted along with the Application Form.

CATEGORY 5: PAPERS, PUBLICATIONS, BOOKS, PRESENTATIONS, EXHIBITS, TEACHING, AND CONSULTING

There is a limit of 40 contact hours in Category 5.

5.1 Papers, articles, publications, exhibits
Ten contact hours may be claimed for an information, library, media-related article, publication, each chapter in an information, library, media-related book or equivalent educational materials, or exhibit that is authored and published or produced. An article must be published in a recognized information, library, media journal: that is, one that is published by an organization which is read primarily by those in the profession. Credit may be claimed only once for the educational content regardless of the format (article, paper, chapter in a book, exhibit, etc.) even though it may be used repeatedly in different formats.

5.2 Books.
Forty contact hours may be claimed for publication of a whole book. If any materials are produced by co-authorship, the amount of credit that can be claimed is presented under Category 5 in the conversion chart in the Appendix.

5.3 Teaching.
Teaching is included in this category as it calls for the same general type of intellectual activity as publication. For each hour of student-contact teaching, two additional hours may be claimed for preparation. Credit may not be claimed by professors for those classes which are part of their regular paid position. For repeat presentations, the instructor will receive no credit unless it can be demonstrated that the subject matter involved was changed sufficiently to require additional study or research.

5.4 Consulting.
When a consultant offers instruction to a practitioner, credit can be claimed provided the consultation is expanded to meet the definition of a planned program of continuing education. The consultation period should not be less than one hour. Credit may be claimed on an hour-for-hour basis, not to exeed the credit hour limit for this category. An abstract of objectives and content covered should accompany the Application Form.

CATEGORY 6: ASSOCIATION ACTIVITIES

There is a limit of 20 contact hours in Category 6.

Credit may be claimed for holding an elected association office and for serving as a committee chairperson. To qualify for the contact hours for offices held, the individual should specify the nature of the benefit received and the type of learning gained. A chart showing the varying amounts of contact hours for association activities is presented in the Appendix.

Attendance for attending planned programs at conferences may be claimed in Category 3.

CATEGORY 7: Other Meritorious Learning Experience

There is a limit of 20 contact hours in Category 7.

Category 7 includes any meritorious continuing information, library, media education experiences that are not appropriate for any of the other categories. Examples might be exchange-of-position programs (learning in another library for a specified period of time), internships, and practica, providing no academic credit or CEU's are granted for these types of experiences. In claiming Category 7 hours, the following questions about the learning experience must be answered in a letter attached to the application form for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION.

7.1 What continuing education need was this experience designed to meet?
7.2 How was this continuing education need determined?
7.3 What was the learning objective(s)?
7.4 What was the knowledge level or skill that was achieved?
7.5 What were the activities that were used to meet this objective?
7.6 What educational techniques were used in the continuing education program?
7.7 Who was the instructor or learning consultant with whom the activity was planned and/or carried out?
7.8 How was the experience evaluated in terms of meeting the learning objectives?
7.9 How many hours were spent in the activity?
7.10 What were the inclusive dates of the experience?
7.11 Where was it done?

IMPORTANT NOTE

IF YOU WISH TO APPLY FOR A STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION AFTER YOU HAVE COMPLETED 120 HOURS OF CONTINUING EDUCATION, IT IS NECESSARY TO:

1. Request that your transcript be sent from the
   CLENE INFORMATION LIBRARY MEDIA SYSTEM
   NATIONAL CONTINUING EDUCATION REGISTRY
   P.O. Box 1008
   Iowa City, Iowa 52243
   to
   CLENE RECOGNITION SERVICE
   620 Michigan Avenue, N.E.
   Washington, D.C. 20064

2. Fill out and send to CLENE RECOGNITION SERVICE the Application for CLENE's STATEMENT OF OF ACKNOWLEDEMENT FOR CONTINUING EDUCATION. Please note that on this form you need to list what is on your transcript by Categories 1 through 7. Note that Categories 1.3; 3.1; 3.3; 3.4; 4.7; 4.9; 5.4; 6; and 7 require a descriptive note attached to the Application Form, in addition to the information requested on the form, itself.

DRAFT for REVIEW

APPENDIX A

CONVERSION CHART: ASSIGNMENT OF CONTACT HOURS[1] FOR CONTINUING EDUCATION ACTIVITES

Type of Activity	Unit of Measure	Contact Hours
Academic courses:		
Semester credit	1 unit	15
Trimester credit	1 unit	14
Quarter credit	1 unit	10
Semester audit	1 unit	8
Trimester audit	1 unit	7
Quarter audit	1 unit	5
Association activities:		
Attendance at information, library, media pre-planned programs which have specific objectives and include an evaluation process and with documentation of participation.	50 minutes	1
National association officer or committee chair with statement on benefit received and type of learning gained.	1 year service	10
Regional or state officer, committee chair, or journal editor with statement on benefit received and type of learning gained.	1 year service	5
Local officer or committee chair with statement on benefit received and type of learning gained.	1 year service	3
Audiovisual materials:		
Audiovisual materials, such as videotapes, audiotapes, films, filmstrips, slides, etc. used individually and without direct supervision, if the learning materials are organized to meet clearly defined objectives and are evaluated.	50 minutes	1

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[1] The purpose of converting all activities into 50-minute contact hours is to develop uniformity in the measurement of continuing education activity. A contact hour is 50 minutes of continuous participation. Credit is granted only for full contact hours. For example, a group program lasting 100 minutes would count for 2 hours; however, one lasting between 50 and 100 minutes would count for only 1 hour. For continuous programs, when individual segments are less than 50 minutes, the sum of the segments may be considered one total program. For example, five 30-minute presentations would equal 150 minutes and should be counted as 3 contact hours.

CONVERSION CHART: ASSIGNMENT OF CONTACT HOURS (continued) APPENDIX A

Type of Activity	Unit of Measure	Contact hours
Consultation:		
Consultation offered BY a practitioner, if it meets the definition of a "planned program,"[1] if it is not less than fifty minutes, if it is documented by an abstract of objectives and content covered.	50 minutes	1
Learning received FROM a consultant, if it meets the definition of a "planned program," if the instructional period is not less than 50 minutes, and if the name of the consultant(s) and an abstract of topic discussed are documented.	50 minutes	1
Continuing Education Unit:	1 CEU	10
"One continuing education unit is defined as: ten contact hours of participation. . . in an organized continuing education experience. . . under responsible sponsorship . . . capable direction . . . and qualified instruction."[2]		
"The number of contact hours and appropriate CEU must be determined prior to the beginning of the program, but only after the objectives, content, format, methods of instruction and program schedule have been established. The decision to award CEU is not to be made after the offering of the program."[3]		

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[1] A "planned program" of continuing education is defined as one that covers a subject area in the scope and depth that is appropriate for the intended audience and that is planned, administered and evaluated in terms of educational objectives that define a level of knowledge or a specific performance-skill to be attained. From: American Medical Association, *Information Booklet: The Physician's Recognition Award 1978-1979* (Chicago, Illinois: American Medical Association, 1979), p. 8.

[2] Council on the Continuing Education Unit, *Criteria and Guidelines for Use of the Continuing Education Unit*, rev. ed. (Silver Spring, MD: The Council on the Continuing Education Unit, 1979), p. 1.

[3] *Ibid.*, p. 13.

CONVERSION CHART: ASSIGNMENT OF CONTACT HOURS (continued) APPENDIX A

Type of Activity	Unit of Measure	Contact hours
Home Study Programs:		
"Home study is enrollment and study with an educational institution which provides lesson materials prepared in a sequential and logical order for study by a student on his/her own. When each lesson is completed, the student mails the assigned work to the school for correction, grading, comment, and subject matter guidance by qualified teachers. Corrected assignments are returned immediately to the student. This exchange provides for a personalized student-teacher relation relationship."[1] Example: if average is 500 minutes to complete: 500 ÷ 50 = 10 ÷ 2=5 Contact Hours.	Average completion time in minutes	1/2 average completion time
Independent Study:		
Independent self-study programs should be documented, including: subject of study, objectives, and outline of content.	Average completion time in minutes	1/2 average completion time
Institutes:	50 minutes	1
Interactive technologies:		
Interactive technologies include continuing education disseminated by open and closed television networks, broadcasts by satellite or radio, with or without two-way communications, and telephone networks, if the learning materials are pre-planned and organized to meet clearly defined objectives, and there is a provision for evaluation.	50 minutes	1
Internships:		
During the time an individual is full-time in an internship no other credits in any category toward the Statement of Acknowledgement for Continuing Education can be earned.	Full-time for academic year	50
	Full-time for 1/2 academic year	25

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[1] National Home Study Council, Home Study School Accreditation (Washington, D.C.: National Home Study Council, 1979), p. 1.

Type of Activity	Unit of Measure	Contact Hours
Journal Clubs:		
If documented by a written summary of session(s).	50 minutes	1
Lecture Series:		
Lecture series that are pre-planned around specific topics, with stated objectives, and have an evaluation process included.	50 minutes	1
Newspaper Courses:	Average completion time in minutes	1/2 average completion time
Post-Master's study:		
With statement of how to be used in professional responsibilities.	Full-time for academic year;	50
	Full-time for 1/2 academic year	25
For part-time study, see "academic courses."		
Presentations and exhibits:		
Presentations must be made and exhibits shown to information, library, media related groups.	50 minutes	1
Programmed Learning:		
Computer assisted instruction programs, electronic teaching aids and devices, and programmed printed materials that are planned and presented as organized learning experiences.	50 minutes	1

CONVERSION CHART: ASSIGNMENT OF CONTACT HOURS (continued) APPENDIX A

Type of Activity	Unit of Measure	Contact Hours
Publications:		
Articles in recognized journals:		
--Research oriented journals:		
• Single author	1 article	10
• One of two authors	1 article	8
• One of more than two authors	1 article	5
--Information sharing journals:	1 article	1
Books:		
--Whole book by single author	1 book	40
--Co-authors	1 book	20
--Chapter in book	1 chapter	10
Book Reviews: in recognized journals.	1 review	1
Technical Reports:		
--Single author	1 report	10
--Co- author	1 report	5
Reading:		
Reading of information, library, media publications such as journals, papers, technical reports, research studies, etc. Necessary to give full bibliographical reference(s) and abstract of content.	50 minutes	1
Self-Assessment Activities:		
Time spent in taking self-assessment tests and audits.	50 minutes	1
Self-Learning:		
The use of organized learning[1] materials which includes but is not limited to:		
• Audiotapes, videotapes, films, filmstrips and slides;	50 minutes	1

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[1] Organized learning experiences are activities which have preplanned learning objectives, instructional methods, specific content, designation of clientele to be served, and evaluation methods.

Type of Activity	Unit of Measure	Contact Hours
Self-Learning (continued):		
• Continuing education delivered by open and closed television networks, broadcasts and satellites or radio, with or without two-way communication, electronic teaching aids and devices;	50 minutes	1
• Computer-assisted instruction programs;	50 minutes	1
• Programmed printed materials and packages;	Average minutes	1/2 avera
• Reading information, library, media publications, monographs, and research studies;	50 minutes	1
○ Home study and correspondence materials.	Average minutes	1/2 averag
Participants in self-learning activities should document their participation including: provider, title, brief description of content, dates, location, and number of contact hours.		
Teaching:		
Courses, workshops, seminars the first time given. For example, if course has 8 contact hours, teacher could receive 16 hours for preparation plus 8 hours for presentation is equal to 24 contact hours.	50 minute presentation plus 2 hours for preparation	3
Workshops:	50 minutes	1

A TAXONOMY OF INSTRUCTIONAL PROGRAMS IN HIGHER EDUCATION

Section I:

CONVENTIONAL ACADEMIC SUBDIVISIONS OF KNOWLEDGE AND TRAINING

0100 AGRICULTURE and NATURAL RESOURCES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the production of food and management of natural fiber, plant, forest, and wildlife resources.

0101	Agriculture, general
0102	Agronomy (field crops, and crop management)
0103	Soils science (management and conservation)
0104	Animal science (husbandry)
0105	Dairy science (husbandry)
0106	Poultry science
0107	Fish, game, and wildlife management
0108	Horticulture (fruit and vegetable production)
0109	Ornamental horticulture (floriculture, nursery science)
0110	Agricultural and farm management
0111	Agricultural economics
0112	Agricultural business
0113	Food science and technology
0114	Forestry
0115	Natural resources management
0116	Agriculture and forestry technologies (baccalaureate and higher programs)
0117	Range management
0199	Other, specify

0200 ARCHITECTURE and ENVIRONMENTAL DESIGN

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with training for a profession in designing buildings, communities, parks, and other manmade aspects of the physiosocial environment.

0201	Environmental design, general
0202	Architecture
0203	Interior design
0204	Landscape architecture
0205	Urban architecture
0206	City, community, and regional planning
0299	Other, specify

0300 AREA STUDIES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with programs designed to study cultures indigenous to specific geographic regions.

0301	Asian studies, general
0302	East Asian studies
0303	South Asian (India, etc.) studies
0304	Southeast Asian studies
0305	African studies
0306	Islamic studies
0307	Russian and Slavic studies
0308	Latin American studies
0309	Middle Eastern studies
0310	European studies, general
0311	Eastern European studies
0312	West European studies
0313	American studies
0314	Pacific area studies
0399	Other, specify

0400 BIOLOGICAL SCIENCES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the science of life or living matter in all its forms and phenomena especially with regard to the origin, growth, reproduction, and structure of life forms.

0401	Biology, general
0402	Botany, general
0403	Bacteriology
0404	Plant pathology
0405	Plant pharmacology
0406	Plant physiology
0407	Zoology, general
0408	Pathology, human and animal
0409	Pharmacology, human and animal
0410	Physiology, human and animal
0411	Microbiology
0412	Anatomy
0413	Histology
0414	Biochemistry
0415	Biophysics
0416	Molecular biology
0417	Cell biology (cytology, cell physiology)
0418	Marine biology
0419	Biometrics and biostatistics
0420	Ecology
0421	Entomology
0422	Genetics
0423	Radiobiology
0424	Nutrition, scientific (excludes nutrition in home economics and dietetics)
0425	Neurosciences
0426	Toxicology
0427	Embryology
0499	Other, specify

0500 BUSINESS and MANAGEMENT

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. related to the organization, operation, administration, and control of private and public organizations.

0501	Business and commerce, general
0502	Accounting
0503	Business statistics
0504	Banking and finance
0505	Investments and securities
0506	Business management and administration
0507	Operations research
0508	Hotel and restaurant management
0509	Marketing and purchasing
0510	Transportation and public utilities
0511	Real estate
0512	Insurance
0513	International business
0514	Secretarial studies (baccalaureate and higher programs)
0515	Personnel management
0516	Labor and industrial relations
0517	Business economics
0599	Other, specify

0600 COMMUNICATIONS

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. related to collection, preparation, and presentation of ideas and information intended for popular consumption through mass media.

0601	Communications, general
0602	Journalism (printed media)
0603	Radio/television
0604	Advertising
0605	Communication media (use of videotape, films, etc., oriented specifically toward radio/television)
0599	Other, specify

0700 COMPUTER and INFORMATION SCIENCES

Subject field designations which characterize students, faculty, facilities, degree programs, course work, research projects, etc. having to do with the design, development, and application of computer capabilities to data storage and manipulation and related computational procedures.

0701	Computer and information sciences, general
0702	Information sciences and systems
0703	Data processing
0704	Computer programming
0705	Systems analysis
0799	Other, specify

0800 EDUCATION

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. related to administration and control of educational organizations and institutions and subjects related to instruction and services both within and outside of such formal organizations.

0801	Education, general
0802	Elementary education, general
0803	Secondary education, general
0804	Junior high school education
0805	Higher education, general
0806	Junior and community college education
0807	Adult and continuing education
0808	Special education, general
0809	Administration of special education
0810	Education of the mentally retarded
0811	Education of the gifted
0812	Education of the deaf
0813	Education of the culturally disadvantaged
0814	Education of the visually handicapped
0815	Speech correction
0816	Education of the emotionally disturbed
0817	Remedial education
0818	Special learning disabilities
0819	Education of the physically handicapped
0820	Education of the multiple handicapped
0821	Social foundations (history and philosophy of education)
0822	Educational psychology (include learning theory)
0823	Pre-elementary education (kindergarten)
0824	Educational statistics and research
0825	Educational testing, evaluation and measurement
0826	Student personnel (counseling and guidance)
0827	Educational administration
0828	Educational supervision
0829	Curriculum and instruction
0830	Reading education (methodology and theory)
0831	Art education (methodology and theory)
0832	Music education (methodology and theory)
0833	Mathematics education (methodology and theory)
0834	Science education (methodology and theory)
0835	Physical education
0836	Driver and safety education
0837	Health education (include family life education)
0838	Business, commerce, and distributive education
0839	Industrial arts, vocational, and technical education
0899	Other, specify

0900 ENGINEERING

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the practical application of basic scientific knowledge to the design, production, and operation of systems intended to facilitate man's control and use of his natural environment.

0901	Engineering, general
0902	Aerospace, aeronautical and astronautical engineering
0903	Agricultural engineering
0904	Architectural engineering
0905	Bioengineering and biomedical engineering
0906	Chemical engineering (include petroleum refining)
0907	Petroleum engineering (exclude petroleum refining)
0908	Civil, construction, and transportation engineering
0909	Electrical, electronics, and communications engineering
0910	Mechanical engineering
0911	Geological engineering
0912	Geophysical engineering
0913	Industrial and management engineering
0914	Metallurgical engineering
0915	Materials engineering
0916	Ceramic engineering
0917	Textile engineering
0918	Mining and mineral engineering
0919	Engineering physics
0920	Nuclear engineering
0921	Engineering mechanics
0922	Environmental and sanitary engineering
0923	Naval architecture and marine engineering
0924	Ocean engineering
0925	Engineering technologies (baccalaureate and higher programs)
0999	Other, specify

1000 FINE and APPLIED ARTS

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the creation and appreciation of the diverse modes of communicating ideas and emotions by means of stylized, visual, and nonvisual representations and symbols.

1001	Fine arts, general
1002	Art (painting, drawing, sculpture)
1003	Art history and appreciation
1004	Music (performing, composition, theory)
1005	Music (liberal arts program)
1006	Music history and appreciation (musicology)
1007	Dramatic arts
1008	Dance
1009	Applied design (ceramics, weaving, textile design, fashion design, jewelry, metalsmithing, interior decoration, commercial art)
1010	Cinematography
1011	Photography
1099	Other, specify

1100 FOREIGN LANGUAGES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. related to mastery of a language other than English or related to the study of a foreign culture through exploration of the literature of that culture as expressed in the vernacular language.

1101	Foreign languages, general (includes concentration on more than one foreign language without major emphasis on one language)
1102	French
1103	German
1104	Italian
1105	Spanish
1106	Russian
1107	Chinese

1108 Japanese
1109 Latin
1110 Greek, classical
1111 Hebrew
1112 Arabic
1113 Indian (Asiatic)
1114 Scandinavian languages
1115 Slavic languages (other than Russian)
1116 African languages (non-Semitic)
1199 Other, specify

1200 HEALTH PROFESSIONS

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the maintenance and restoration of physical and mental health.

1201 Health professions, general
1202 Hospital and health care administration
1203 Nursing (baccalaureate and higher programs)
1204 Dentistry, D.D.S. or D.M.D. degree
1205 Dental specialties (work beyond first-professional degree, D.D.S. or D.M.D.)
1206 Medicine, M.D. degree
1207 Medical specialties (work beyond first-professional degree, M.D.)
1208 Occupational therapy
1209 Optometry
1210 Osteopathic medicine, D.O. degree
1211 Pharmacy
1212 Physical therapy
1213 Dental hygiene (baccalaureate and higher programs)
1214 Public health
1215 Medical record librarianship
1216 Podiatry (Pod.D. or D. P.) or podiatric medicine (D.P.M.)
1217 Biomedical communication
1218 Veterinary medicine (D.V.M. degree)
1219 Veterinary medicine specialties (work beyond first-professional degree, D.V.M.)
1220 Speech pathology and audiology
1221 Chiropractic
1222 Clinical social work (medical and psychiatric and specialized rehabilitation services)
1223 Medical laboratory technologies (baccalaureate and higher programs)
1224 Dental technologies (baccalaureate and higher programs)
1225 Radiologic technologies (baccalaureate and higher programs)
1299 Other, specify

1300 HOME ECONOMICS

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the theory and practice of family and home care including the science of foods, home decoration and management, and child care.

1301 Home economics, general
1302 Home decoration and home equipment
1303 Clothing and textiles
1304 Consumer economics and home management
1305 Family relations and child development
1306 Foods and nutrition (include dietetics)
1307 Institutional management and cafeteria management
1399 Other, specify

1400 LAW

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with instruction in the legal customs, practices, and rules of society and states for the purpose of pursuing a career in jurisprudence.

1401 Law, general
1499 Other, specify

1500 LETTERS

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with English language and literature and value systems related to ancient and modern cultures.

1501 English, general
1502 Literature, English
1503 Comparative literature
1504 Classics
1505 Linguistics (include phonetics, semantics, and philology)
1506 Speech, debate, and forensic science (rhetoric and public address)
1507 Creative writing
1508 Teaching of English as a foreign language
1509 Philosophy
1510 Religious studies (exclude theological professions)
1599 Other, specify

EXPANSION OF HEGIS SECTION 1600 LIBRARY SCIENCE

Note: The subject areas are taken from the CLENE Directory of Continuing Education Opportunities for Library--Information--Media Personnel and have been adapted to meet the 16 character limit for subject terms.

	1601	Library science, general
Academic Librarianship	1602	ACADEMIC LIB'SHIP
Administration and Management	1603	ADMINISTRATION
Adults, Materials and Services for	1604	ADULT SERVICES
Aging, Materials and Services for	1605	AGING--SERVICES
Archives	1606	ARCHIVES
Art Librarianship	1607	ART LIB'SHIP
Audio Visual Services	1608	A-V SERVICES
Automation and Data Processing		Use 0703 Data processing
Bibliography	1609	BIBLIOGRAPHY
Bibliotherapy	1610	BIBLIOTHERAPY
Bilingualism in Librarianship	1611	BILINGUALISM
Budgeting and Finance	1612	BUDGET/FINANCING
Buildings and Facilities	1613	BLDINGS/FACILITY
Business and Economics Materials and Services	1614	BUSINESS SERVICE
Business Literature	1615	BUSINESS LIT
Cataloging and Classification	1616	CATALOGING/CLASS
Children, Materials and Services for	1617	CHILDREN SERVICE
Church Librarianship	1618	CHURCH LIB'SHIP
Communications		Use 0601 Communications, general
Community Agencies Serving Youth		Use 2101 Community services, general
Community Analysis	1619	COMMUNITY ANAL
Conservation and Preservation of Library Materials SEE Preservation		
Consulting Skills	1620	CONSULTING SKILL
Continuing Education		Use 0807 Adult and continuing education
Copyright Law	1621	COPYRIGHT LAW
Data Bases (Including Construction)	1622	DATA BASES
Disadvantaged, Materials and Services for	1623	DISADVANTAGED
Dissemination	1624	DISSEMINATION
Education for Librarianship SEE Library Education		
Educational Technology	1625	EDUC TECHNOLOGY
Evaluation (Techniques and Methods)	1626	EVALUATION
Federal Librarianship	1627	FEDERAL LIB'SHIP
Fundraising	1628	FUNDRAISING
Government Documents	1629	GOVT DOCUMENTS
Governmental Relations Pertinent to Libraries	1630	GOVT RELATIONS
Grantsmanship	1631	GRANTSMANSHIP
Handicapped, Materials and Services for	1632	HANDICAPPED-SERV
History of Books, Printing and Libraries	1633	HISTORY OF BOOKS
Human Resources Development	1634	HUMAN RESOURCES

Indexing and Abstracting	1635	INDEXING/ABSTR
Information Broker	1636	INFO BROKER
Information Counseling	1637	INFO COUNSELING
Information Management	1638	INFORMATION MGT
Information Science		Use 0701 Computer and information sciences, general
Information Systems and Networks		Use 0702 Information sciences and systems
Institutionalized, Materials and Services for	1639	INSTITU SERVICES
Intellectual Freedom	1640	INTELL'L GREEDOM
International Comparative Librarianship	1641	INT'L COMPAR LIB
Introduction to Librarianship		Use 1601 Library science, general
Law Librarianship	1642	LAW LIB'NSHIP
Library as a Social Organization	1643	LIB: SOCIAL ORG
Library Technicians, Programs for		Use 5504 Library assistant technolog
Literacy	1644	LITERACY
Manuscripts	1645	MANUSCRIPTS
Map Librarianship	1646	MAP LIB'NSHIP
Marketing of Library/Information Services		Use 0509 Marketing and purchasing
Media: Design, Production	1647	MEDIA DESIGN/PRO
Media: Organization and Management	1648	MEDIA ORG & MGT
Medical Librarianship	1649	MEDICAL LIB'SHIP
Microforms	1650	MICROFORMS
Minorities, Materials and Services for	1651	MINORITIES--SERV
Needs Assessment	1652	NEEDS ASSESSMENT
Networking	1653	NETWORKING
Planning and Development	1654	PLANNING/DEVELOP
Preservation	1655	PRESERVATION
Prison Librarianship	1656	PRISON LIB'NSHIP
Public Librarianship	1657	PRBLIC LIB'NSHIP
Public Relations	1658	PUBLIC RELATIONS
Public Services	1659	PUBLIC SERVICES
Publishing	1660	PUBLISHING
Rare Book Librarianship	1661	RARE BOOK LIB
Reference	1662	REFERENCE
Reprography	1663	REPROGRAPHY
Research	1664	RESEARCH
School/Media Librarianship	1665	SCHOOL/MEDIA LIB
Science and Technology Materials	1666	SCI & TECH MAT'L
Selection and Acquisition of Library Materials	1667	SELECTION & ACQ
Serials Control	1668	SERIALS CONTROL
Social Sciences Literature	1669	SOCIAL SCI LIT
Special Librarianship	1670	SPECIAL LIB'SHIP
Staff Development	1671	STAFF DEVELOPM'T
State Library Agency Work	1672	STATE LIB AGENCY
Storytelling	1673	STORYTELLING
Systems	1674	SYSTEMS
Systems Analysis		Use 0705 Systems analysis
Technical Services	1675	TECHNICAL SERV'S
Training	1676	TRAINING
Trustees	1677	TRUSTEES
Unionization	1678	UNIONIZATION
User Orientation and Education	1679	USER ORIENTATION
Young Adults, Materials and Services for	1680	YOUNG ADULT SERV

1700 MATHEMATICS

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the science of numbers and space configurations and their operations, measurement, relationships, and abstractions.

1701	Mathematics, general
1702	Statistics, mathematical and theoretical
1703	Applied mathematics
1799	Other, specify

1800 MILITARY SCIENCES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with techniques and skills unique to the pursuit of a professional career as a military officer.

1801	Military science (Army)
1802	Naval science (Navy, Marines)
1803	Aerospace science (Air Force)
1899	Other, specify

1900 PHYSICAL SCIENCES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with the basic nature of matter, energy, and associated phenomena.

1901	Physical sciences, general
1902	Physics, general (exclude biophysics)
1903	Molecular physics
1904	Nuclear physics
1905	Chemistry, general (exclude biochemistry)
1906	Inorganic chemistry
1907	Organic chemistry
1908	Physical chemistry
1909	Analytical chemistry
1910	Pharmaceutical chemistry
1911	Astronomy
1912	Astrophysics
1913	Atmospheric sciences and meteorology
1914	Geology
1915	Geochemistry
1916	Geophysics and seismology
1917	Earth sciences, general
1918	Paleontology
1919	Oceanography
1920	Metallurgy
1999	Other, specify

2000 PSYCHOLOGY

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with behavioral and mental processes.

2001	Psychology, general
2002	Experimental psychology (animal and human)
2003	Clinical psychology
2004	Psychology for counseling
2005	Social psychology
2006	Psychometrics
2007	Statistics in psychology
2008	Industrial psychology
2009	Developmental psychology
2010	Physiological psychology
2099	Other, specify

2100 PUBLIC AFFAIRS and SERVICES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. related to developing and improving competencies in the management and operation of governmental agencies.

2101	Community services, general
2102	Public administration
2103	Parks and recreation management
2104	Social work and helping services (other than clinical social work)
2105	Law enforcement and corrections (baccalaureate and higher programs)
2106	International public service (other than diplomatic service)
2199	Other, specify

2200 SOCIAL SCIENCES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. having to do with all aspects of the past and present activities, conduct, interactions, and organizations of humans.

2201	Social sciences, general
2202	Anthropology
2203	Archaeology
2204	Economics
2205	History
2206	Geography
2207	Political science and government
2208	Sociology
2209	Criminology
2210	International relations
2211	Afro-American (black culture) studies
2212	American Indian cultural studies
2213	Mexican-American cultural studies
2214	Urban studies
2215	Demography
2299	Other, specify

2300 THEOLOGY

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. related to preparation and training for a religious vocation.

2301	Theological professions, general
2302	Religious music
2303	Biblical languages
2304	Religious education
2399	Other, specify

4900 INTERDISCIPLINARY STUDIES

Subject field designations which characterize students, faculty, facilities, degree programs, research projects, etc. involving more than one major discipline without primary concentration in any one area.

4901	General liberal arts and sciences
4902	Biological and physical sciences
4903	Humanities and social sciences
4904	Engineering and other disciplines
4999	Other, specify

Section II:

TECHNOLOGICAL AND OCCUPATIONAL CURRICULUMS LEADING TO ASSOCIATE DEGREES AND OTHER AWARDS BELOW THE BACCALAUREATE

5000 BUSINESS and COMMERCE TECHNOLOGIES

Subject field designations which characterize students, faculty, facilities, degree and certificate programs, etc. specifically associated with development of skills required for commercial, business, or secretarial occupations at the semiprofessional level. Two years of preparation beyond high school are usually sufficient for entrance into these occupational fields.

5001	Business and commerce technologies, general
5002	Accounting technologies
5003	Banking and finance technologies
5004	Marketing, distribution, purchasing, business, and industrial management technologies
5005	Secretarial technologies (include office machines training)
5006	Personal service technologies (stewardess, cosmetologist, etc.)
5007	Photography technologies
5008	Communications and broadcasting technologies (radio/television, newspapers)
5009	Printing and lithography technologies
5010	Hotel and restaurant management technologies
5011	Transportation and public utility technologies
5012	Applied arts, graphic arts, and fine arts technologies (include advertising design)
5099	Other, specify

5100 DATA PROCESSING TECHNOLOGIES

Subject field designations which characterize students, faculty, facilities, degree and certificate programs, etc. specifically associated with development of skills required for data processing or related occupations at the *semiprofessional level. Two years of preparation beyond high school are usually sufficient for entrance into these occupational fields.*

5101	Data processing technologies, general
5102	Key punch operator and other input preparation technologies
5103	Computer programmer technologies
5104	Computer operator and peripheral equipment operation technologies
5105	Data processing equipment maintenance technologies
5199	Other, specify

5200 HEALTH SERVICES and PARAMEDICAL TECHNOLOGIES

Subject field designations which characterize students, faculty, facilities, degree and certificate programs, etc. specifically associated with development of skills required for health service related occupations at the semiprofessional level. Two years of preparation beyond high school are usually sufficient for entrance into these occupational fields.

5201	Health services assistant technologies, general
5202	Dental assistant technologies
5203	Dental hygiene technologies
5204	Dental laboratory technologies
5205	Medical or biological laboratory assistant technologies
5206	Animal laboratory assistant technologies
5207	Radiologic technologies (X-ray, etc.)
5208	Nursing, R.N. (less than 4-year program)
5209	Nursing, practical (L.P.N. or L.V.N.—less than 4-year program)
5210	Occupational therapy technologies
5211	Surgical technologies
5212	Optical technologies (include ocular care, ophthalmic, optometric technologies)
5213	Medical record technologies
5214	Medical assistant and medical office assistant technologies
5215	Inhalation therapy technologies
5216	Psychiatric technologies (include mental health aide programs)
5217	Electro diagnostic technologies (include E.K.G., E.E.G., etc.)
5218	Institutional management technologies (rest home, etc.)
5219	Physical therapy technologies
5299	Other, specify

5300 MECHANICAL and ENGINEERING TECHNOLOGIES

Subject field designations which characterize students, faculty, facilities, degree and certificate programs, etc. specifically associated with development of skills required for mechanical and engineering related occupations at the semiprofessional level. Two years of preparation beyond high school are usually sufficient for entrance into these occupational fields.

5301	Mechanical and engineering technologies, general
5302	Aeronautical and aviation technologies
5303	Engineering graphics (tool and machine drafting and design)
5304	Architectural drafting technologies
5305	Chemical technologies (include plastics)
5306	Automotive technologies
5307	Diesel technologies
5308	Welding technologies
5309	Civil technologies (surveying, photogrammetry, etc.)
5310	Electronics and machine technologies (television, appliance, office machine repair, etc.)
5311	Electromechanical technologies
5312	Industrial technologies
5313	Textile technologies
5314	Instrumentation technologies
5315	Mechanical technologies
5316	Nuclear technologies
5317	Construction and building technologies (carpentry, electrical work, plumbing, sheet metal, air conditioning, heating, etc.)
5399	Other, specify

5400 NATURAL SCIENCE TECHNOLOGIES

Subject field designations which characterize students, faculty, facilities, degree and certificate programs, etc. specifically associated with development of skills required for natural science related occupations at the semiprofessional level. Two years of preparation beyond high school are usually sufficient for entrance into these occupational fields.

5401	Natural science technologies, general
5402	Agriculture technologies (include horticulture)
5403	Forestry and wildlife technologies (include fisheries)
5404	Food services technologies
5405	Home economics technologies
5406	Marine and oceanographic technologies
5407	Laboratory technologies, general
5408	Sanitation and public health inspection technologies (environmental health technologies)
5499	Other, specify

5500 PUBLIC SERVICE RELATED TECHNOLOGIES

Subject field designations which characterize students, faculty, facilities, degree and certificate programs etc. specifically associated with development of skills required for public service related occupations at the semiprofessional level. Two years of preparation beyond high school are usually sufficient for entrance into these occupational fields.

5501	Public service technologies, general
5502	Bible study or religion-related occupations
5503	Education technologies (teacher aide and 2-year teacher training programs)
5504	Library assistant technologies
5505	Police, law enforcement, corrections technologies
5506	Recreation and social work related technologies
5507	Fire control technology
5508	Public administration and management technologies
5599	Other, specify

CLENE, INC.
CONTINUING LIBRARY
EDUCATION NETWORK
AND EXCHANGE
620 Michigan Avenue, N.E.
Washington, D.C. 20064
(202) 635-5825

APPLICATION FOR CLENE'S
STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

Participation in Information, Library Media Continuing Education

Important:
Your application for the STATEMENT is based on your continuin education activities for the three years immediately precedin the date of your signature below. Only activities within thi period can be accepted.
Please read the Information Booklet before proceeding.

Please Note: This form is designed ONLY for those who wish to qualify for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION. Those who wish only to maintain a transcript-type record continuously in the National Registry, need only comply with the instructions relative to the Registry as outlined in the Information Booklet.

PLEASE PRINT NAME AND ADDRESS HERE:

Name ______________________________

Street ______________________________

____

City ________________ State ________ Zip ________

Social Security Number: ________________

MAILING INSTRUCTIONS

Send this completed application to:

CLENE
RECOGNITION SERVICE
620 Michigan Avenue, N.E.
Washington, D.C. 20064

I hereby apply for the CLENE Statement of Acknowledgement for Continuing Education and certify that the information provided is correct.

____________ Date ____________________ Signature

Fee Information
Please Check:
( ) No fee for CLENE members
( ) A $15.00 fee is charged for non-CLENE members. This fee is non-refundable.
( ) If you are not a CLENE membe and plan to join, or would like information about joining CLENE

In order to speed up the issuance of your STATEMENT OF ACKNOWLEDGEMENT, please request th CLENE INFORMATION LIBRARY MEDIA SYSTEM: NATIONAL CONTINUING EDUCATION REGISTRY (P.O. Box 1008, Iowa City, Iowa 52243) to send your transcript to the CLENE RECOGNITION SERVIC (620 Michigan Avenue, N.E., Washington, D.C. 20064) at the same time you send in thi form. or a few weeks prior to your mailing this Application Form.

ALL WHO WORK IN OR WITH LIBRARIES, INFORMATION, OR MEDIA CENTERS CAN APPLY FOR THE STATEMENT OF ACKNOWLEDGEMENT OF CONTINUING EDUCATION WITHOUT REGARD TO MEMBERSHIP IN CLENE.

FOR CLENE's STATEMENT OF ACKNOWLEDGEMENT

Category 1: Continuing Education Activities with Approved Sponsorship.
A minimum of 40 contact hours in this category is required for the STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION; however, all 120 contact hours may be earned here. Be sure to use the official name of the approved provider. For 1980 and before, activities awarded academic credit or CEU's may be entered in this category. See Information Booklet, Category 1, for more details.

Approved Provider	Headquarters Office of the Provider		Description of Learning Activity	Inclusive Dates	Contact Hours
	City	State			
Please print or type					

Total number of contact hours in Category 1 ____________

Category 2: Academic Credits and CEU Activities without Approved Sponsorship. (A 40 contact hour limit.)
Credit may be claimed for activities for which either academic credit or CEU's have been granted by providers not approved by National Council or approved State or Multistate Councils.

Provider	Headquarters Office of the Provider		Description of Learning Activity	Inclusive Dates	Contact Hours
	City	State			

Total number of contact hours in Category 2 ______________

Category 3: Informal Group Activities. (A 30 Contact Hour Limit.)
Learning activities in a group mode which do not have the formal structure of those in Categories 1 and 2 and/or those for which no academic credit or CEU's have been given.

Type of Activity	Title	Description of Activity	Inclusive Dates	Contact Hours

Total number of contact hours in Category 3

Category 4: Informal Individual Activities. (A 30 contact Hour Limit, Limit of 15 contact hours in each sub-category.)
Individual learning activities for which no academic credit or CEU's are awarded.

Type of Activity	Title	Description of Activity and Provider (if any)	Inclusive Dates	Contact Hours

Total number of contact hours in Category 4 ________

Category 5: Papers, Presentations, Books, Teaching, Exhibits, Consulting. (A 40 Contact Hour Limit.)
Ten contact hours may be claimed for each information, library, media-related paper, publication, or book chapter presented or published during last 3 years. See Category 5 in Information Booklet.

Type of Activity	Title	Title of Journal or Educational Institution	Date Completed	Contact Hours

Total number of contact hours in Category 5 ________

Category 6: Association Activities. (A 20 Contact Hour Limit.)
Credit may be claimed for holding an elected association office or serving a committee chair.

Office Held	Association	Description of Benefit Received	Inclusive Dates	Contact Hours

Total number of contact hours in Category 6 ________

Category 7: Other Meritorious Learning Experience. (A 20 Contact Hour Limit.)
(Attach description--see Information Booklet--Category 7--for instructions.

Total number of contact hours in Category 7 ________

TOTAL Contact Hours Completed During the Three Year Period Immediately Preceding the Date of this Application	280

279

APPENDIX K

APPLICATION FOR APPROVAL OF AN ORGANIZATION

APPLICATION FOR APPROVAL OF AN ORGANIZATION: ADDENDUM GUIDELINES AND INSTRUCTIONS FOR INDIVIDUALIZED PROGRAMS AND ACTIVITIES

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

APPLICATION FOR APPROVAL OF A SINGLE OFFERING
(SHORT FORM)

APPLICATION FOR APPROVAL OF A SINGLE OFFERING: GUIDELINES AND INSTRUCTIONS

APPLICATION FOR APPROVAL OF A SINGLE OFFERING: ADDENDUM GUIDELINES AND INSTRUCTION FOR INDIVIDUALIZED PROGRAMS AND ACTIVITIES

APPLICATION FOR APPROVAL OF A LEARNING CONSULTANT

APPLICATION FOR APPROVAL OF A STATE/MULTISTATE COUNCIL

APPLICATION FOR APPROVAL OF AN ORGANIZATION

This application is formatted so that required information can be written in immediately following the question. If this is not enough space or if the information requested already exists in another format, information can be appended to the form. At the specific place in the form, mark "See attached." For each attachment, clearly mark at the to of the page the question number it is answering and a short phrase or key terms to identify the subject of the question. The attachments should be forwarded with the application sequenced numerically to conform with the questions.

FOR INTERNAL USE ONLY

*Date of receipt*________________

*Application #*________________

1. TYPE OF APPLICATION

- If your program is being reviewed for the first time, check Initial Application.
- If your program is currently approved and this review is to extend or renew the approval, check Renewal. Give the date the current approval was granted.
- If your program was previously reviewed and approval was denied, check Initial Application.

. CLENE NATIONAL CONTINUING EDUCATION REGISTRY SPONSOR CODE

Every sponsor is assigned a four letter code at its first entry into the Registry. This code is used by the sponsor for its life in the Registry. If this code has been assigned for your unit, please fill in the blanks.

APPLICATION FOR APPROVAL OF AN ORGANIZATION

I. TYPE OF APPLICATION

1. INITIAL APPLICATION_____

RENEWAL_____ DATE OF CURRENT APPROVAL ____________

II. ORGANIZATION

2. NAME____

DIVISION/SECTION______________________________

ADDRESS_______________________________________

____

CONTACT PERSON__________________________ TELEPHONE________________

3. TYPE OF ORGANIZATION. *(Check one)*

ACADEMIC INSTITUTION
_____GRADUATE PROGRAM
_____BACHELORS PROGRAM
_____ASSOCIATES PROGRAM
_____UNIVERSITY/COLLEGE EXTENSION
_____STATE LIBRARY AND/OR MEDIA AGENCY
_____ORGANIZATION OR SYSTEM
_____NETWORK
_____INFORMATION SYSTEM SUPPLIER/VENDOR/BROKER

PROFESSIONAL ASSOCIATION
_____INTERNATIONAL
_____NATIONAL
_____MULTISTATE
_____STATE
_____LOCAL
OTHER, *specify*________________________
____

4. CLENE NATIONAL CONTINUING EDUCATION REGISTRY SPONSOR CODE ___ ___ ___ ___

5. CO-SPONSORS, IF ANY

DO YOU COOPERATE WITH OTHER ORGANIZATIONS IN DEVELOPING AND/OR PRESENTING CONTINUING EDUCATION ACTIVITIES?

NO _____ YES _____ IF YES, LIST THE NAME AND ADDRESS OF EACH CO-SPONSOR DURING THE LAST YEAR; DESCRIBE THE PLANNING, DEVELOPMENT, AND ADMINISTRATIVE RESPONSIBILITIES OF EACH; AND GIVE A BRIEF DESCRIPTION OF THE PROGRAM.

NAME AND ADDRESS	PROGRAM DESCRIPTION	RESPONSIBILITIES

Continued. . .

5. CO-SPONSORS, *continued*

NAME	PROGRAM DESCRIPTION	RESPONSIBILITIES

III. ADMINISTRATION

6. STRUCTURE

- PERSON IN CHARGE OR THE CONTINUING EDUCATION PROGRAM/CONTINUING EDUCATION ADMINISTRATOR

  NAME____

  POSITION TITLE________________________________

  PERCENT OF FULL-TIME ALLOCATED TO CONTINUING EDUCATION__________%

  HOW SELECTED____
  (By virtue of job description, office held, chosen, elected, volunteered, etc.)

  TERM OF OFFICE, IF APPLICABLE______________ __________

  HOW LONG HAS THIS POSITION EXISTED?__________ __________

  WHAT EXPERIENCE AND QUALIFICATIONS DOES THIS PERSON HAVE FOR THE POSITION?

  ____

  ____

- COMMITTEE, IF PRESENT

  NATURE *(Check as many as appropriate)*

  ADVISORY_____ STANDING_____ AD HOC_____ WORKING_____

  NUMBER OF MEMBERS_____ LENGTH OF TERM____________ STAGGERED TERM: YES___ NO___

- PERSON TO WHOM THE CONTINUING EDUCATION ADMINISTRATOR REPORTS

  NAME____

  POSITION TITLE________________________________

Continued. . .

7. ADDITIONAL PERSONNEL

DESIGN/DEVELOPMENT TEAM. A number of skills and areas of expertise are needed to design and develop an educational offering. These skills are often brought to bear on an offering through use of a team of persons. The roles represented by the team include:

policy-maker
administrator
curriculum specialist
instructional techniques specialist
media production specialist
subject content specialist
presentor (persons who conduct learning sessions)

Describe the members of your design/development team (omitting presentors who are covered in Question #14.)

- State the function(s) or role each person performs on the team
- Briefly describe the qualifications of the persons in terms of the functions performed on the team. The qualifications may be from education, job, or experience in that area.

SUPPORT PERSONNEL. Beyond the tasks performed by the design team and the faculty, many duties of a support nature must be handled. These include typing, reproduction, registration, recordkeeping, equipment maintenance, equipment operation, and facility set-up.

- List the functions that have or will be performed to support this offering by others than the design team and faculty.
- Estimate the number of hours that will be spent on each function.

8. BUDGET

Categories of expenditures can include:

Honoraria for faculty--speakers, panel members, resource persons
Salaries for development team, administrators, and support personnel
Supplies/equipment related to learning
Printing/mailing of promotional material
Travel
Room rental
Meals/refreshments

6. STRUCTURE, *continued*

- DESCRIBE THE CONTINUING EDUCATION ADMINISTRATOR'S SCOPE OF AUTHORITY AND ACCOUNTABILITY. CONSIDER THE VARIOUS FACETS SUCH AS ACTIVITY DEVELOPMENT, FEES, BUDGET, FACULTY SELECTION, AND PROMOTION OF THE ACTIVITIES.

7. ADDITIONAL PERSONNEL

DESCRIBE THE STAFF INVOLVED IN THE CONTINUING EDUCATION PROGRAM BESIDES THE FACULTY/PRESENTORS AND THE ADMINISTRATOR, SUCH AS THE DESIGN/DEVELOPMENT TEAM AND THE SUPPORT PERSONNEL. INDICATE THE PERCENTAGE OF TIME ALLOCATED AND THE FUNCTIONS PERFORMED.

8. BUDGET

HOW IS THE CONTINUING EDUCATION PROGRAM SUPPORTED? INDICATE SOURCES OF FUNDS; ORGANIZATIONAL SUPPORT THAT MAY BE AVAILABLE FOR ACTIVITY DEVELOPMENT AND IMPROVEMENT; AND CATEGORIES OF EXPENDITURES FOR PROGRAM OPERATION.

Continued. . .

8. BUDGET, *continued*

THE BUDGET FOR THE CONTINUING EDUCATION PROGRAM: *(Fill in the blanks or check)*

IS SEPARATE YES_____ NO_____

HAS SEPARATE ACCOUNT NUMBERS YES_____ NO_____

INCLUDES ALL DIRECT COSTS YES_____ NO_____

INCLUDES ALL INDIRECT COSTS YES_____ NO_____

WHAT CRITERIA ARE USED IN DETERMINING FEES FOR CONTINUING EDUCATION ACTIVITIES?

IV. GOALS

9. PROGRAM GOALS

BRIEFLY DESCRIBE YOUR OVERALL CONTINUING EDUCATION PROGRAM AND ITS GOALS.

DESCRIBE HOW THE GOALS ARE ESTABLISHED AND BY WHOM

12. DEVELOPMENT PROCESS

Describe the process used for your entire program. Describe the process for developing a specific course or offering in Question #13 below.

10. PRIMARY TARGET AUDIENCE(S) *(Check as many as appropriate)*

_____CLERICAL/SUPPORT PERSONNEL

_____LIBRARY TECHNICAL ASSISTANTS

_____MEDIA TECHNICIANS

_____PARAPROFESSIONALS (LIBRARY ASSOCIATES)

_____LIBRARIANS

_____MEDIA SPECIALISTS

_____ADMINISTRATORS

_____TECHNICAL INFORMATION SPECIALISTS

_____SPECIALISTS (IN SYSTEM ANALYSIS, PROGRAMMING, PERSONNEL, BUDGET, PUBLIC RELATIONS, ETC.)

_____TRUSTEES

_____VOLUNTEERS

_____FRIENDS GROUP MEMBERS

_____USERS

_____OTHERS, *specify*____

11. NEEDS ASSESSMENT

DESCRIBE YOUR NEEDS ASSESSMENT PROCEDURES, INCLUDING SPECIFIC TECHNIQUES, SOURCES OF INPUT, AND PERSONS/GROUPS RESPONSIBLE FOR THE NEEDS ASSESSMENT. *(If instruments are used, check here and attach copies_____.)*

V. PROGRAM DEVELOPMENT

12. DEVELOPMENT PROCESS

DESCRIBE THE PROCESS USED IN PLANNING CONTINUING EDUCATION ACTIVITIES, INCLUDING PEOPLE INVOLVED, THE PLANNING CYCLE, HOW THE NEEDS ASSESSMENT RESULTS ARE UTILIZIED IN PLANNING, AND ANY CRITERIA USED IN ACTIVITY SELECTION.

13. ACTIVITY DEVELOPMENT

If contractors are used to develop and/or present an activity, give explicit information on the methods used to begotiate the terms and responsibilities of all parties and to monitor and review the work of the contractor.

14. FACULTY/PRESENTORS

The faculty or presentors include all persons who conduct learning sessions, such as, lecturers, members of panels, moderators or discussion leaders, resource experts for discussion sessions, instructors for demonstrations, and those who prepare and present cases for group discussion. The faculty should have expertise in the subject content, techniques of teaching/learning, and communication skills.

13. ACTIVITY DEVELOPMENT

DESCRIBE THE PROCESS FOLLOWED IN DESIGNING AND DEVELOPING A COURSE OR ACTIVITY AND WHO IS INVOLVED. INCLUDE DEVELOPMENT OF THE CONTENT, DESIGN OF THE INSTRUCTIONAL STRATEGIES, AND SELECTION OF THE INSTRUCTIONAL MATERIALS.

14. FACULTY/PRESENTORS

DESCRIBE THE FACULTY/PRESENTORS FOR THE CONTINUING EDUCATION ACTIVITIES SPONSORED DURING THE LAST AND CURRENT YEAR.

_____%INTERNAL STAFF (OF THIS ORGANIZATION)

_____%ACADEMIC INSTITUTION FACULTY

_____%CONSULTANT

_____%VENDOR STAFF

_____%STATE LIBRARY/MEDIA AGENCY STAFF

_____%PROFESSIONAL ASSOCIATION STAFF

_____%MEMBER OF THE INFORMATION, LIBRARY, MEDIA COMMUNITY

_____%OTHER, *specify*____

STATE THE CRITERIA FOR SELECTION OF FACULTY/PRESENTORS

DESCRIBE ANY TRAINING OR STAFF DEVELOPMENT PROVIDED FOR FACULTY/PRESENTORS

15. TYPE OF ACTIVITIES AND QUANTITY.

For example, if you offer four different workshops but two are held twice, you would fill in the blanks as follows:

WORKSHOPS ____ 4 ____ 6

15. TYPE OF ACTIVITIES AND QUANTITY. PROVIDE BOTH THE NUMBER OF INDIVIDUAL COURSES OR ACTIVITIES OFFERED AND THE TOTAL NUMBER HELD.

TYPE	NUMBER OF EACH		NUMBER HELD	
	LAST YEAR	CURRENT YEAR	LAST YEAR	CURRENT YEAR
ACADEMIC OFFERINGS				
ACADEMIC COURSES	____	____	____	____
ACADEMIC INDEPENDENT STUDY	____	____	____	____
INTERNSHIPS OR PRACTICA	____	____	____	____
EDUCATION FOR ADVANCED DEGREE OR CERTIFICATE	____	____	____	____
GROUP LEARNING ACTIVITIES				
INSTITUTES	____	____	____	____
WORKSHOPS	____	____	____	____
SEMINARS	____	____	____	____
SHORT COURSES	____	____	____	____
CONFERENCE PROGRAMS	____	____	____	____
*INDIVIDUALIZED PROGRAMS AND ACTIVITIES				
CORRESPONDENCE COURSES	____	____	____	____
MEDIATED LEARNING MODULES	____	____	____	____
COMPUTER-ASSISTED INSTRUCTION MODULES	____	____	____	____
PROGRAMMED TEXTS	____	____	____	____
NON-ACADEMIC INTERNSHIPS	____	____	____	____
HOME STUDY COURSES	____	____	____	____
OTHER, *specify*				
____________	____	____	____	____
____________	____	____	____	____
____________	____	____	____	____

* IF YOU OFFER ANY SELF-INSTRUCTIONAL PACKAGES, ONE MUST BE SELECTED AS A REPRESENTATIVE ACTIVITY IN ANSWERING QUESTION 27 BELOW. ALSO, READ CAREFULLY THE ADDENDUM GUIDELINES AND INSTRUCTIONS FOR INSTRUCTIONAL PACKAGES AND FOLLOW IT CAREFULLY WHEN FILLING OUT THIS ENTIRE APPLICATION.

16. MEDIA SELECTION

INDICATE THE CRITERIA FOR SELECTION OF MEDIA AND INSTRUCTIONAL MATERIALS.

17. INSTRUCTIONAL METHODS AND MEDIA

DESCRIBE THE TYPES OF INSTRUCTIONAL METHODS AND MEDIA USED IN YOUR PROGRAM. GIVE AN INDICATION AS TO THE EXTENT OF USE OF EACH TECHNIQUE. WHERE APPROPRIATE, INDICATE WHETHER THE PRODUCTS OR MATERIALS USED ARE PRODUCED IN-HOUSE OR SELECTED FROM EXISTING, OUTSIDE SOURCES.

18. INDIVIDUALIZATION

DESCRIBE THE KIND OF STEPS TAKEN TO ADJUST THE ACTIVITIES TO INDIVIDUAL NEEDS, LEARNING STYLES, AND PACE. DESCRIBE SEVERAL REPRESENTATIVE OPPORTUNITIES FOR INDIVIDUALIZED LEARNING THAT HAVE BEEN OFFERED IN YOUR EXISTING ACTIVITIES.

Continued. . .

VI. FACILITIES

19. FACILITIES

DESCRIBE THE FACILITIES CURRENTLY AVAILABLE OR YOUR CRITERIA FOR SELECTION FOR FACILITIES FOR USE IN PRESENTING ACTIVITIES.

20. RESOURCES

DESCRIBE THE RESOURCES AVAILABLE TO THE CONTINUING EDUCATION PROGRAM TO COMPLEMENT AND/OR SUPPLEMENT THE ACTIVITIES:

- THE FOLLOWING RESOURCES ARE AVAILABLE TO THE DESIGN/DEVELOPMENT TEAM AND FACULTY IN DEVELOPING THEIR CONTINUING EDUCATION PROGRAM AND MATERIALS. *(EXAMPLE: graphics studio, A-V materials collection, computer access--terminal and time, etc.)*

- THE FOLLOWING RESOURCES ARE AVAILABLE TO PARTICIPANTS IN A CONTINUING EDUCATION ACTIVITY. *(EXAMPLE: library, special collections, learning resource center, laboratory, etc.)*

VII. EVALUATION

21. EVALUATION OF THE PROGRAM

DESCRIBE THE PROCEDURES USED TO EVALUATE YOUR OVERALL CONTINUING EDUCATION PROGRAM--ITS GOALS, OBJECTIVES, PLANS, AND ACHIEVEMENTS. STATE WHO IS INVOLVED, HOW OFTEN IT OCCURS, TECHNIQUES USED, AND HOW RESULTS ARE COMMUNICATED AND UTILIZED.

22. EVALUATION OF SPECIFIC ACTIVITIES

DESCRIBE THE POLICY AND PROCEDURES FOR EVALUATING EACH SPECIFIC ACTIVITY. *(Attach copies of any instruments used.)*

- ARE EXPERTS USED IN THE DESIGN OF THE EVALUATION PROCEDURES OR IN THE EVALUATION ITSELF FROM OUTSIDE OR WITHIN THE ORGANIZATION? WITH WHAT CREDENTIALS?
- IS PILOT TESTING PERFORMED?
- ARE PARTICIPANTS ASKED TO EVALUATE THE ACTIVITY AND IF SO, HOW?
- ARE PARTICIPANTS EVALUATED TO DETERMINE ACHIEVEMENT OF LEARNING OBJECTIVES AND IF SO, HOW?

25. RECORDKEEPING

Briefly describe what, if any, permanent records are kept for participants in your program. How long are they kept? How are they made available, e.g., transcripts?

23. GRIEVANCES

STATE THE GRIEVANCE POLICY AND PROCEDURES AVAILABLE TO PARTICIPANTS OF YOUR PROGRAM.

VIII. ADMINISTRATIVE SERVICES

24. REGISTRATION

DESCRIBE THE REGISTRATION POLICY AND PROCEDURES FOR YOUR PROGRAM. STATE THE POLICY ON CANCELLATIONS, DROPS, AND LATE ADDITIONS.

25. RECORDKEEPING

DESCRIBE THE RECORDKEEPING SYSTEM FOR PARTICIPANTS OF YOUR PROGRAM.

Continued. . .

25. RECORDKEEPING, *continued*

INDICATE WHETHER DOCUMENTATION OF PARTICIPATION IS PROVIDED FOR EACH ACTIVITY AND IF SO, WHAT KIND. *(Attach a sample copy of each.)*

26. PROMOTION

STATE YOUR POLICY ON PROMOTION OF THE CONTINUING EDUCATION PROGRAM.

DESCRIBE THE TECHNIQUES FOR PROMOTION USED LAST YEAR AND DURING THE CURRENT YEAR. SUBMIT COPIES OF SAMPLE BROCHURES, ADVERTISEMENTS, PRESS RELEASES, AND ANNOUNCEMENTS FROM THE PAST YEAR.

27. REPRESENTATIVE ACTIVITIES

- SCOPE OF CONTENT. Make a short statement that describes the topics to be covered and the scope of each including the level of complexity. A content outline that reflects the range of the subject matter written in a manner similiar to a course description would be appropriate.

- PURPOSE OF OFFERING. Make a short statement on why this offering is being presented and the purposes it is to serve.

- UNIT OF MEASURE. All offerings must be assigned a number of contact hours or the equivalent credit to contact hours must be computed.

- LEVEL OF OFFERING.

  Overview/Summary. A general coverage of the information in its basic framework to present a complete but limited view of the subject.

  State-of-the-Art Survey. A comprehensive, in-depth presentation of the subject giving the most current information in the field.

  Refresher/Review. A review of the subject which can include "how-we-did-it" reports.

  Basic Instruction. Elementary material on "new" subjects for novice participants.

  Intermediate Instruction. Material beyond the fundamental level on "new" subjects.

  Advanced Instruction. Material is based on intermediate pre-requisite knowledge and/or skills.

  Issues, Problems, Trends. Emphasis on theory, future directions, and projections rather than on methodology or facts.

- METHOD OF DELIVERY. The method of delivery is the major means used to communicate with the participant as opposed to a teaching aid or an instructional strategy. Select from the following:

  Live presentation
  Radio
  Television
  Satellite
  Telephone
  Print
  Computer-assisted
  Mediated (A-V, e.g., film, video cassette, etc.)
  Mail (Correspondence)

- FORMAT, METHODS, AND MATERIALS. Select from the following list:

  Audio tapes or cassettes
  Case study materials
  Computer-assisted instruction
  Demonstration
  Diagnostic tests
  Field experience
  Films
  Games
  Laboratory work
  Maps, charts, etc.
  On site visits
  Picture boards
  Programmed instruction (self-teaching devices)
  Problem sets and exercises
  Question and answer
  Radio
  Reading material/text
  Realia, models, etc.
  Resource persons
  Role-playing exercises
  Simulation methods

Continued. . .

IX. ACTIVITIES

27. REPRESENTATIVE ACTIVITIES

SELECT THREE ACTIVITIES FROM LAST YEAR OR THE CURRENT YEAR'S SCHEDULE THAT BEST REPRESENT YOUR PROGRAM AND ITS DIVERSITY. ONE MUST BE SELECTED FROM EACH OF THE MAJOR AREAS CHECKED IN QUESTION #15. A COPY OF ANY INDIVIDUALIZED PROGRAM OR HOME STUDY COURSE MUST BE SUBMITTED.

FOR EACH ACTIVITY PROVIDE THE FOLLOWING INFORMATION. LABEL EACH PIECE OF INFORMATION WITH THE APPROPRIATE NUMBER AND KEY WORDS FOR IDENTIFICATION.

(1) TITLE OF OFFERING

(2) SCOPE OF CONTENT

(3) TYPE OF OFFERING *(See Question #15)*

(4) PURPOSE OF OFFERING

(5) CO-SPONSOR, IF ANY

(6) NUMBER OF TIMES OFFERED

(7) LOCATION(S) FOR EACH TIME HELD

- ⁑ CITY AND STATE
- ⁑ MEETING PLACE

(8) NUMBER OF PARTICIPATNS ENROLLED OR PREDICTED FOR EACH TIME OFFERED

(9) TIME SCHEDULE

- ⁑ NUMBER OF SESSIONS
- ⁑ LENGTH OF A SESSION (IN HOURS AND/OR MINUTES)
- ⁑ SCHEDULE OF SESSIONS (DAILY, WEEKLY, ETC.)
- ⁑ IF A SELF-INSTRUCTIONAL PACKAGE:
    - -- NUMBER OF UNITS
    - -- ESTIMATED COMPLETION TIME FOR TOTAL PROGRAM

(10) UNIT OF MEASURE AWARDED

ACADEMIC CREDITS___#

CEU'S___#

OTHER_____________________ ___#

⁑ NUMBER OF CONTACT HOURS__________

(11) BUDGETED AMOUNTS FOR:

- ⁑ SALARY OR HONORARIA FOR FACULTY/PROSENTORS
- ⁑ SALARY FOR DEVELOPMENT TEAM, ADMINISTRATORS, AND SUPPORT PERSONNEL
- ⁑ SUPPLIES/EQUIPMENT RELATED TO LEARNING
- ⁑ PRINTING/MAILING OF PROMOTIONAL MATERIALS
- ⁑ ALL OTHER

27. REPRESENTATIVE ACTIVITIES, *continued*

Slides/filmstrips	Tests
Syllabi (outlines and handbooks)	Video tapes or cassettes
Television	Workbooks

Other, *specify*

- FACILITIES AND EQUIPMENT DESCRIPTION. Describe the room(s) and physical layout (arrangements) to be used. List all the equipment to be used.
- EVALUATION TECHNIQUES USED. Describe all phases of evaluation used including:
  - -- Evaluation techniques used for the participants.
  - -- Evaluation techniques used by the participants.
  - -- Identification of new needs.
  - -- Preliminary evaluation.

27. REPRESENTATIVE ACTIVITIES, *continued*

- (12) SOURCES OF INCOME
  - ※ TUITION CHARGES $_____________ @ $__________ PER PARTICIPANT
  - ※ GIFTS AND/OR GRANTS
  - ※ CONTRIBUTION OF TIME OR SERVICES
  - ※ OVERHEAD PROVIDED AND/OR ABSORBED BY ORGANIZATION
  - ※ OTHER, *specify*
- (13) TARGET AUDIENCE *(see Question #10)*
- (14) LEVEL OF OFFERING
  - OVERVIEW/SUMMARY
  - STATE-OF-THE-ART SURVEY
  - REFRESHER/REVIEW
  - BASIC INSTRUCTION
  - INTERMEDIATE INSTRUCTION
  - ADVANCED INSTRUCTION
  - ISSUES, PROBLEMS, TRENDS
- (15) NEEDS ASSESSMENT TECHNIQUES USED *(Attach a copy of instrument(s) used)*
- (16) PRE-REQUISITES *(Attach copies of appropriate materials)*
- (17) LEARNING OBJECTIVES
- (18) CRITERIA/PERFORMANCE MEASURES
- (19) MODE
  - LARGE-GROUP
  - SMALL-GROUP
  - INDEPENDENT STUDY
- (20) METHOD OF DELIVERY
- (21) FORMAT, METHODS, AND MATERIALS
- (22) DESIGN/DEVELOPMENT TEAM *(See Question #7)*
  - ※ TEAM MEMBERS NAME, ROLE/FUNCTION, AND CREDENTIALS
  - ※ DESCRIBE PROCESS OF DESIGN AND DEVELOPMENT FOLLOWED
- (23) FACULTY/PRESENTORS *(See Question #14)*
  - NAME
  - ROLE OR FUNCTION
  - CREDENTIALS *(Attach vita)*
- (24) INDIVIDUALIZATION OPPORTUNITIES *(See Question #18)*
- (25) FACILITIES AND EQUIPMENT DESCRIPTION
- (26) EVALUATION TECHNIQUES USED *(See Question #22) (Attach copies of instruments used)*
- (27) HOW PROMOTED *(See Question #26) (Attach copies of materials)*

28. SCHEDULE OF ACTIVITIES FOR CURRENT YEAR

PREPARE A SCHEDULE OF THE ACTIVITIES THAT WILL BE PRESENTED AS PART OF YOUR CONTINUING EDUCATION PROGRAM FOR THE CURRENT YEAR. FOR EACH ACTIVITY, PROVIDE BRIEF INFORMATION ON THE FOLLOWING:

- TITLE
- TYPE OF OFFERING
- PRIMARY TARGET AUDIENCE(S) AND NUMBER OF PARTICIPANTS
- SCHEDULED DATE(S) AND LOCATION(S)
- FEE
- LEARNING OBJECTIVES
- FACULTY/PRESENTORS

APPLICATION FOR APPROVAL OF AN ORGANIZATION

ADDENDUM GUIDELINES AND INSTRUCTIONS FOR INDIVIDUALIZED PROGRAMS AND ACTIVITIES

These guidelines and instructions cover organizations who design, develop, and offer instructional packages that are for generalized, multiple users but are to be used independently in a self-instructional mode. Examples of such packages include correspondence courses, programmed texts, computer-assisted instruction modules, and mediated learning modules or kits.

NOTE: While the Home Study Courses are a type of correspondence course, they have to meet specific qualifications and criteria set down by the Home Study Council in order to accurately carry the Home Study designation. The standards for Home Study Courses are available separately.

As stated in the Criteria for Quality, these packages must follow the general Criteria as well as those specifically stated for Individualized Programs and Activities and for Instructional Materials. The organization will be reviewed in terms of how well it is equipped to produce quality individualized offerings. Since the Criteria cannot be adequately applied without first hand examination of the package, a copy of an instructional package must be provided along with the application.

The Application for Approval of an Organization is the basic document, and these guidelines are to augment the standard instructions and amplify and clarify those questions that are pertinent for individualized packages.

- If your organization is applying for initial approval and your type of offerings include individualized offerings and activities, use these instructions along with the standard quidelines for the Application for Approval of an Organization.
- If your organization currently has Approved Status for group learning activities and you wish to extend the Approval to individualized programs and activities, complete only those questions listed below the application, giving information pertinent to the individualized activities in order to supplement the information provided on the original application.

. TYPE OF APPLICATION

If the organization has Approved Status, check Renewal, add an asterisk, and give the date the current approval was granted.

Renewal ✓ *

5. CO-SPONSORS

If there are any co-sponsors involved, so state along with their responsibilities.

7. ADDITIONAL PERSONNEL

Careful attention will be given to the design/development team, their roles or functions, and their credentials. State the criteria for selection of the team members.

8. BUDGET

If there is a separate budget for the instructional packages and/or different criteria for determining fees, so state.

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TARGET AUDIENCES

If the primary target audiences differ for the individualized offerings, so indicate with an asterisk for those groups to whom the individualized offerings will be directed.

11. NEEDS ASSESSMENT

If the needs assessment procedures or techniques differ for the individualized offerings, so state and describe them.

3. ACTIVITY DEVELOPMENT

Describe the process used in designing and developing an individualized package. In addition to the requested details, include the areas of production, pilot testing, field testing, revisions, and updating.

5. TYPE OF ACTIVITIES AND QUANTITY

- Check those types of activities that are to be offered--if applicable, include those types previously approved.
- For individualized offerings, "number held" should represent the number of packages sold or utilized.

6. MEDIA SELECTION

This must be described for the individualized offerings.

17. INSTRUCTION METHODS AND MEDIA

These must be described for the individualized offerings. Specific attention will be given to the source (in-house or external) of the products and materials.

8. INDIVIDUALIZATION

The fact that the package is designed for self-instruction does not assure individualization. Describe if there are opportunities for self-pacing, branching, choice of media, skipping sections if competence is present, etc.

20. RESOURCES

Complete both sections of this question in terms of the individualized offerings. There may not be any resources for participants, but if any consultation, testing, scoring, or referral is available to a learner, describe it here.

22. EVALUATION OF SPECIFIC ACTIVITIES

- Describe the preliminary techniques used to validate the package, such as pilot testing, field testing, and checks for accuracy. Describe the test audience, their characteristics, and numbers (how many).
- Describe how learners will be evaluated to determine their achievements of the learning objectives and/or performance measures.
- Describe how learners will be monitored as to their progress during the course of the activity. Include any opportunities for feedback and/or interaction.
- Describe any procedures available for identifying needs of learners that vary from those established at the beginning and on which the offering was designed to meet. Describe how the offering will be adjusted to meet these needs. These could take the form of references for further study or referral to a resources network.

- Describe any methods used for the learners to evaluate the offering as to content and effectiveness of the materials and methods.

23. GRIEVANCES

State the policy for individualized offerings if it varies.

24. REGISTRATION

Describe the policy used, or if the material is leased or sold, so state.

25. RECORDKEEPING

If this is appropriate for your individualized offering and it differs from the group learning offerings, please describe.

26. PROMOTION

Describe the techniques used for promoting the individualized offering and attach copies.

27. REPRESENTATIVE ACTIVITIES

A specific indivualized offering must be selected, a copy of the package submitted, and the complete information provided. Careful attention will be given to the following sections:

--prerequisites
--learning objectives
--criteria/performance measures
--individualization opportunities
--design/development
--evaluation.

The actual instructional package will be reviewed in the following areas:

- Are the instructional methods and materials

  --varied as to purpose
  --suitable for the mode
  --current and timely
  --matched as to content and attributes of the media
  --acceptable in technical quality?

- Is there an adequate instructor's kit?

- Is there an adequate learner's kit?

CLEVRS

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

This application is formatted so that required information can be written in immediately following the question. If this is not enough space or if the information requested already exists in another format, information can be appended to the form. At the specific place in the form, mark "See attached." For each attachment, clearly mark at the top of the page the question number it is answering and a short phrase or key terms to identify the subject of the question. The attachments should be forwarded with the application sequenced numerically to conform with the questions.

FOR INTERNAL USE ONLY

*Date of receipt*________________

*Application #*________________

GUIDELINES AND INSTRUCTIONS

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

I. TYPE OF APPLICATION

1.

- If the offering is being reviewed for the first time, check Initial Application.
- If the offering is currently approved and this review is to extend or renew the approval, check Renewal. Give the date the current approval was granted.
- If the offering was previously reviewed and approval was denied, check Initial Approval.

II. SPONSOR/PROVIDER INFORMATION

3. CLENE NATIONAL CONTINUING EDUCATION REGISTRY SPONSOR CODE

Every sponsor is assigned a four letter code at its first entry into the Registry. This code is used by the sponsor for its life in the Registry. If this code has been assigned for your unit, please fill in the blanks.

5. CO-SPONSOR

If the development and/or presentation of this offering is a joint venture, provide the information for each co-sponsor.

- o The type of provider. Select the appropriate type from the list in Question #4.
- o Role and responsibilities. Describe the role of the co-sponsor(s) in planning, development, and administration of the offering.

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

I. TYPE OF APPLICATION

1. INITIAL APPLICATION_____

RENEWAL__________ DATE OF CURRENT APPROVAL__________________

II. SPONSOR/PROVIDER INFORMATION

2. SPONSOR/PROVIDER

NAME____

DIVISION/SECTION____________________________________

ADDRESS____

____

TELEPHONE__________________EXTENSION_______________

3. CLENE NATIONAL CONTINUING EDUCATION REGISTRY SPONSOR CODE ___ ___ ___ ___

4. TYPE OF PROVIDER [Check one]

ACADEMIC INSTITUTION

_____GRADUATE PROGRAM

_____BACHELORS PROGRAM

_____ASSOCIATES PROGRAM

_____UNIVERSITY/COLLEGE EXTENSION

_____STATE LIBRARY AND/OR MEDIA AGENCY

_____ORGANIZATION OR SYSTEM

_____NETWORK

_____VENDOR

PROFESSIONAL ASSOCIATION

_____INTERNATIONAL

_____NATIONAL

_____MULTISTATE

_____STATE

_____LOCAL

_____OTHER, specify____________________

____

5. CO-SPONSOR, IF ANY

NAME____

DIVISION/SECTION____________________________________

ADDRESS____

____

TELEPHONE__________________EXTENSION_______________

III. OFFERING INFORMATION

6. TITLE OF OFFERING

Indicate the title of the offering as it will be announced, promoted, and listed in the National Registry.

9. TIME SCHEDULE

Describe the number of sessions for the offering; the length of each session in hours, minutes, or hours and minutes; and the schedule for the sessions. If the pattern varies with repeated presentations, give the details for each.

If the offering is a self-instructional package, omit the first section and indicate the number of units in the package and the time it is estimated to completed the package in hours, minutes, and hours and minutes as appropriate.

5. CO-SPONSOR, *continued*

PERSON RESPONSIBLE FOR
ADMINISTRATION OF OFFERING ______________________________

POSITION TITLE ______________________________

TYPE OF PROVIDER ______________________________

ROLE AND RESPONSIBILITIES ______________________________

____

____

III. OFFERING INFORMATION

6. TITLE OF OFFERING ______________________________

____

7. TYPE OF OFFERING [Check one]

_____ACADEMIC COURSE
_____ACADEMIC INDEPENDENT STUDY
_____INTERNSHIP OR PRACTICUM
_____HOME STUDY COURSE
_____CORRESPONDENCE COURSE
_____INSTITUTE
_____WORKSHOP
_____SEMINAR
_____SHORT COURSE

_____CONFERENCE PROGRAM
_____MEDIATED LEARNING MODULE
_____COMPUTER-ASSISTED INSTRUCTION MODULE
_____PROGRAMMED TEXT
_____OTHER, specify ______________

____

____

8. FREQUENCY OF OFFERING

THE OFFERING IS TO BE PRESENTED:

_____ONCE
_____MORE THAN ONCE

9. TIME SCHEDULE

OFFERING WILL BE HELD IN _________ SESSIONS.

EACH SESSION WILL LAST _________ HOURS AND/OR MINUTES.

EACH SESSION WILL OCCUR

_____DAILY _____WEEKLY _____TWICE WEEKLY
_____OTHER, specify ______________________________

Continued...

10. UNIT OF MEASURE

Indicate what kind of credit, if any, is to be awarded for this offering and the number of units.

All offerings must be assigned a number of contact hours or the equivalent credit to contact hours must be computed.

11. CLENE NATIONAL CONTINUING EDUCATION REGISTRY COURSE NUMBER

If this is a re-application for approval, fill in the Registry Course Number previously assigned.

12. DATE(S) AND LOCATION(S)

Give the following information for each of the scheduled presentations of the offering.

- Beginning date. The date of the first session.
- Ending date. The date of the last session.
- The city and state where the offering is to be held.
- The meeting place (building and room) where the offering is to be held.

IV. RATIONALE

13. PURPOSE OF THE OFFERING, I.E., REASONS FOR PRESENTING THE OFFERING

Make a short statement on why this offering is being presented and the purposes it is to serve.

14. SCOPE OF THE SUBJECT CONTENT

Make a short statement that describes the topics to be covered and the scope of each including the level of complexity. A content outline that reflects the range of the subject matter written in a manner similar to a course description would be appropriate.

9. TIME SCHEDULE, *continued*

IF A SELF-INSTRUCTIONAL PACKAGE FOR INDIVIDUAL LEARNERS, THE OFFERING HAS __________ UNITS. THE ESTIMATED TIME FOR COMPLETION OF THE TOTAL OFFERING IS __________ HOURS AND/OR MINUTES.

10. UNIT OF MEASURE

THIS OFFERING WILL AWARD

_____(#) ACADEMIC CREDITS (SEMESTER HOURS)
_____(#) ACADEMIC CREDITS (TRIMESTER HOURS)
_____(#) ACADEMIC CREDITS (QUARTER HOURS)
_____(#) CONTINUING EDUCATION UNITS (CEU'S)
_____(#) OTHER, specify________________________________

THIS OFFERING REPRESENTS __________ CONTACT HOURS.

11. CLENE NATIONAL CONTINUING EDUCATION REGISTRY COURSE NUMBER ___ ___ ___ ___

12. DATE(S) AND LOCATION(S)

BEGINNING DATE	ENDING DATE	CITY	STATE	MEETING PLACE

IV. RATIONALE

13. PURPOSE OF THE OFFERING, I.E., REASONS FOR PRESENTING THE OFFERING

14. SCOPE OF THE SUBJECT CONTENT

15. TARGET AUDIENCE

Describe the intended target audience by putting a P for Primary and an S for Secondary for all appropriate groups. There can be more than one primary group and more than one secondary group defined as the intended audience for the offering.

16. LEVEL OF THE OFFERING

Indicate the level of the material in the offering in terms of the target audience by putting a P for Primary group and an S for Secondary group (as expressed in Question 15) for the appropriate description:

- Overview/Summary. A general coverage of the information in its basic framework to present a complete but limited view of the subject.
- State-of-the-Art Survey. A comprehensive, in depth presentation of the subject giving the most current information in the field.
- Refresher/Review. A review of the subject which can include "how-we-did-it" reports.
- Basic Instruction. Elementary material on "new" subjects for novice participants.
- Intermediate Instruction. Material beyond the fundamental level on "new" subjects.
- Advanced Instruction. Material is based on intermediate pre-requisite knowledge and/or skills.
- Issues, Problems, Trends. Emphasis on theory, future directions, and projections rather than on methodology or facts.

For example, an offering designed as intermediate instruction for a paraprofessional might serve as a refresher/review for a professional.

__S__ Refresher/Review

Instruction

_____ Basic

__P__ Intermediate

17. NEEDS ASSESSMENT

If needs analyses were performed that (1) led to the creating of this offering, or (2) defined the content, approach, level, etc. of this offering, please so state. Describe the nature of the assessment, such as peer review findings, self-felt needs of the target audience, or faculty/administrator perceived needs; procedures followed including when (date) the analyses occurred; instruments used such as questionnaires or structured interview schedules. Submit copies of any instruments used as supplementary documentation to accompany this Form.

15. TARGET AUDIENCE [Indicate Primary and Secondary]

_____CLERICAL/SUPPORT PERSONNEL

_____LIBRARY TECHNICAL ASSISTANTS

_____MEDIA TECHNICIANS

_____PARAPROFESSIONALS (LIBRARY ASSOCIATES)

_____LIBRARIANS

_____MEDIA SPECIALISTS

_____ADMINISTRATORS

_____TECHNICAL INFORMATION SPECIALISTS

_____SPECIALISTS (IN SYSTEM ANALYSIS, PROGRAMMING, PERSONNEL, BUDGET, PUBLIC RELATIONS, ETC.)

_____TRUSTEES

_____VOLUNTEERS

_____FRIENDS GROUP MEMBERS

_____USERS

_____OTHERS, specify_______________________________

16. LEVEL OF THE OFFERING

_____OVERVIEW/SUMMARY

_____STATE-OF-THE-ART SURVEY

_____REFRESHER/REVIEW

INSTRUCTION

  _____BASIC

  _____INTERMEDIATE

  _____ADVANCED

_____ISSUES, PROBLEMS, TRENDS

17. NEEDS ASSESSMENT

IF A NEEDS ASSESSMENT WAS PERFORMED IN CONNECTION WITH THE CREATION OF THIS OFFERING, PLEASE DESCRIBE THE TECHNIQUES, PROCEDURES, AND INSTRUMENTS USED. [Attach copies of any instruments.]

____

____

____

18. PREREQUISITES

Some offerings are designed for participants who possess certain competencies, e.g., skills, knowledge (facts), or understanding of concepts, at the beginning of the activity. These entry level competencies are based on the Level of Offering (Question #16) and the primary and secondary target audience groups. They can be stated as performance criteria, as previous completion of specific offerings or courses, or preassigned readings. They can be tested for with a written instrument.

List any prerequisites established for this offering and specify for which target group (primary or secondary) if there is a difference. Include copies of lists of terms, assigned reading lists, entry level tests, and any other relevant materials.

V. INSTRUCTIONAL DESIGN

19. LEARNING OBJECTIVES

A learning objective is a statement of specific learning achievement to be gained from a learning experience. They restate the Rationale (purpose, scope, and level of the offering) in performance or behavioral terms and specify what the participant will be able to do or can expect to gain from attending. Each objective states the performance and the conditions.

Performance -- it specifies what a participant can expect to be able to do upon completion of the learning experience.

Conditions -- it describes the major conditions (if any) under which the performance is to occur.

Some learning objectives are written in such a manner that the criterion is also included.

Criterion -- it indicates the criterion of acceptable performance, that is, it specifies how well the participant must perform in order to demonstrate that the Objective has been achieved.

[See next question (#20)]

Learning objectives must be written for an offering. List the learning objectives for this offering.

17. NEEDS ASSESSMENT, *continued*

____

____

____

18. PREREQUISITES

LIST ANY PREREQUISITES A PERSON MUST POSSESS TO SUCCESSFULLY PARTICIPATE IN THIS OFFERING. BE SPECIFIC AND INCLUDE COPIES OF ANY INSTRUMENTS OR MATERIALS USED.

____

____

____

____

____

V. INSTRUCTIONAL DESIGN

19. LEARNING OBJECTIVES

LIST THE LEARNING OBJECTIVES FOR THIS OFFERING.

1.

2.

3.

4.

5.

6.

7.

8.

20. CRITERIA/PERFORMANCE MEASURES

Criteria specify the expected outcomes for the participant in terms of the level of knowledge, attitude, or performance skill that is expected to be attained. Each learning objective should have a performance measure expressed to use to determine if the objective has been achieved. (This is often written as part of the learning objective.) The entire offering should have stated criteria to use to determine if the unit of measure (CEU, credit, etc.) should be awarded.

- List the criterion/performance measure for each learning objective. If this is included in the learning objectives, so state. You do not need to repeat the criteria here.
- List the criteria for the offering that represents "satisfactory completion" which allows award of credit, CEU, etc.

Attach copies of any instruments (e.g., tests) used in measuring the performance.

21. MODE

State the modes of instruction that will be used, expressed as a percentage. The percentage will be a rough estimate of the time spent in each type of grouping. A small group would number no more than 12 to 15 persons. Independent study could be a one-to-one tutorial or individualized instruction.

22. METHOD OF DELIVERY

The method of delivery is the major means used to communicate with the participant. Any of these methods could be used as a teaching aid or an instructional strategy. [See Question #23] However, the main delivery processes are to be described here, expressed in percentage of the total offering. (A rough estimate is adequate.)

20. CRITERIA/PERFORMANCE MEASURES

LIST THE CRITERIA/PERFORMANCE MEASURES FOR THIS OFFERING. SPECIFY THE MINIMUM LEVEL THAT MUST BE ATTAINED TO CONSIDER THE PARTICIPANT AS HAVING SATISFACTORILY COMPLETED THE OFFERING AND THEREBY EARNED THE UNIT OF MEASURE (CEU, CREDIT, ETC.). [Attach copies of any instruments used to measure performance.]

1.

2.

3.

4.

5.

21. MODE

_____% LARGE-GROUP
_____% SMALL-GROUP
_____% INDEPENDENT STUDY

22. METHOD OF DELIVERY

_____ LIVE PRESENTATION _____%
_____ RADIO _____%
_____ TELEVISION ____%
_____ SATELLITE _____%
_____ PRINT _____%
_____ COMPUTER-ASSISTED _____%
_____ MEDIATED (AUDIO-VISUAL, E.G., FILM, VIDEO CASSETTE, ETC.) _____%
_____ MAIL (CORRESPONDENCE) _____%
_____ TELEPHONE _____%

23. FORMAT, METHODS, AND MATERIALS

The instructional strategies to be employed in this offering are to be described.

- Choose as many as is appropriate.
- The number of hours each is used or the percentage of the whole offering this technique represents is requested. The total number of hours expressed and/or the total percentages will probably exceed the whole due to the techniques being used simultaneously.
- Those techniques that represent or involve use of specific materials or products are to be designated as to source:

  a. custom/internally developed -- those materials designed and developed specifically for this offering.

  b. external/commercially developed -- existing materials selected for use in this offering.

23. FORMAT, METHODS, AND MATERIALS

	TECHNIQUE	NUMBER OF HOURS OR PERCENTAGE	CUSTOM/ INTERNALLY DEVELOPED	EXTERNAL/ COMMERCIALLY DEVELOPED
____	AUDIO TAPES OR CASSETTES			
	CASE STUDY MATERIALS			
____	COMPUTER-ASSISTED INSTRUCTION			
____	DEMONSTRATION			
____	DIAGNOSTIC TESTS			
____	DISCUSSIONS		xxxx	xxxx
____	FIELD EXPERIENCE		xxxx	xxxx
____	FILMS			
____	GAMES			
____	LABORATORY WORK		xxxx	xxxx
____	LECTURES			
____	MAPS, CHARTS, ETC.			
____	ON-SITE VISITS		xxxx	xxxx
____	OVERHEAD PROJECTION			
____	PANEL PRESENTATIONS		xxxx	xxxx
____	PICTURE BOARDS			
____	PROGRAMMED INSTRUCTION (SELF TEACHING DEVICES)			
____	PROBLEM SETS AND EXERCISES			
____	QUESTION AND ANSWER			
____	RADIO			
____	READING MATERIAL/TEXT			
____	REALIA, MODELS, ETC.			
____	RESOURCE PERSONS		xxxx	xxxx
____	ROLE-PLAYING EXERCISES			
____	SIMULATION METHODS			
____	SLIDES/FILMSTRIPS			
____	SYLLABUS (OUTLINES AND HANDOUTS)			
____	TEAM TEACHING		xxxx	xxxx
____	TELEPHONE (CONFERENCE CALLS)		xxxx	xxxx
____	TELEVISION			
____	TESTS			
____	VIDEO TAPES OR CASSETTES			
____	WORKBOOK			
____	OTHER, specify			

24. INDIVIDUALIZATION

Individuals vary in their learning styles, preferences for media, speed in learning, and incoming level of competence.

Make a brief list of all of the techniques or opportunities in the learning strategies that allow for individualization of the learning.

If no opportunities are provided, write "none."

VI. HUMAN RESOURCES

25. DESIGN/DEVELOPMENT TEAM

A number of skills and areas of expertise are needed to design and develop an educational offering. These skills are often brought to bear on an offering through use of a team of persons. The roles represented by the team include:

policy-maker
administrator
curriculum specialist
instructional techniques specialist
media production specialist
subject content specialist
presentor (persons who conduct learning sessions)

Describe the members of your design/development team

- Give the person's name
- State the function(s) or role this person performed on the team
- Briefly describe the qualifications of the person in terms of the functions performed on the team. The qualifications may be from education, job, or experience in that area.

Describe the way the design/development process was carried out. Include development of the content, design of the instructional strategies, selection of the instructional materials, and determination of the evaluation techniques.

24. INDIVIDUALIZATION

LIST ALL OPPORTUNITIES PROVIDED FOR INDIVIDUALIZING THE LEARNING INCLUDING CHOICES OF LEARNING METHOD, CHOICES OF MEDIA, BRANCHING, AND SELF-PACING.

VI. HUMAN RESOURCES

25. DESIGN/DEVELOPMENT TEAM

NAME	FUNCTION	EXPERTISE/CREDENTIALS

DESCRIBE THE PROCESS FOLLOWED IN DESIGNING AND DEVELOPING THE OFFERING.

26. FACULTY

The faculty or presentors include all persons who conduct learning sessions, such as, lectureres, members of panels, moderators or discussion leaders, resource experts for discussion sessions, instructors for demonstrations, and those who prepare and present cases for group discussion. The faculty should have expertise in the subject contect, techniques of teaching/learning, and communication skills.

- Give the name of each faculty member for this offering.
- State the function he/she performs.
- Describe briefly the qualifications the person possesses to serve in this faculty position. [A vita may be provided for this section.]

27. SUPPORT PERSONNEL

Beyond the tasks performed by the design team and the faculty, many duties of a support nature must be handled. These include typing, reproduction, registration, recordkeeping, equipment maintenance, equipment operation, and facility set-up.

- List the functions that have or will be performed to support this offering by others than the design team and faculty.
- Estimate the number of hours that will be spent on each function.

Note: When a member of the design team or the faculty perform a support function, it should be omitted from this question.

26. FACULTY

NAME	FUNCTION	EXPERTISE/CREDENTIALS

STATE THE CRITERIA USED FOR SELELCTION OF FACULTY/PRESENTORS.

____

____

____

27. SUPPORT PERSONNEL

LIST THE NATURE OF THE SUPPORT PROVIDED (FUNCTIONS) AND THE NUMBER OF HOURS EACH IS UTILIZED.

______________________________ __________HOURS

______________________________ __________HOURS

______________________________ __________HOURS

______________________________ __________HOURS

______________________________ __________HOURS

VII. FACILITIES

28. PHYSICAL ENVIRONMENT

- Describe the rooms to be used for this offering. Include dimensions and relevant features, i.e., stage, slanted floor, projection room, etc.
- Describe the layout of the room in terms of where seating is to be placed, podium if any, projection screens and equipment, and any other relevant equipment.
- Describe the furniture for the participants in terms of kind of chairs, tables or desks available, permanently affixed or movable.

29. EQUIPMENT

List all equipment that will be used in this offering. Include quantities of each. This will include audio-visual equipment, demonstration equipment, and equipment for participants' use in a hands-on or laboratory format.

EXAMPLE: 16mm film projector - 1
movie screen - 1
video tape playback unit - 1
video monitors - 3
microphones - 2
speakers - 4
computer terminals - 3
telephone for hook-up - 3

VIII. ADMINISTRATION

31. STRUCTURE

DESCRIBE THE ADMINISTRATIVE STRUCTURE: THE PERSONS INVOLVED, THEIR FUNCTION, THEIR TERMS, THE SELECTION PROCESS, THE RELATIONSHIP TO THE LARGER ORGANIZATION, AND THE ACCOUNTABILITY ARRANGEMENT.

32. BUDGET

TOTAL AMOUNT BUDGETED $__________

BREAKDOWN OF COSTS

HONORARIA FOR FACULTY -- SPEAKERS, PANEL MEMBERS, RESOURCE PERSONS	$__________
SALARIES FOR DEVELOPMENT TEAM, ADMINISTRATORS, AND SUPPORT PERSONNEL	$__________
SUPPLIES/EQUIPMENT RELATED TO LEARNING	$__________
PRINTING/MAILING OF PROMOTIONAL MATERIAL	$__________
TRAVEL	$__________
ROOM RENTAL	$__________
MEALS/REFRESHMENTS	$__________
OTHER, specify	$__________

FEE/TUITION PER PERSON $__________

HOW DETERMINED__________

SOURCES OF INCOME

TUITION CHARGES	$__________
GIFTS AND/OR GRANTS	$__________
CONTRIBUTION OF TIME OR SERVICES	$__________
OVERHEAD PROVIDED AND/OR ABSORBED BY ORGANIZATION	$__________
OTHER, specify	

33. PROMOTION

Check those techniques used to promote this offering. Attach copies of materials used, where possible. For example, brochures, press releases, etc.

34. PERMANENT RECORDS AND CERTIFICATES

- Briefly describe what, if any, permanent records are kept for participants in this offering. How long are they kept? How are they made available, e.g., transcripts?

IX. EVALUATION

Evaluation occurs at several levels and at many times throughout the course of an offering. Participants are evaluated as to their achievement. Faculty are evaluated as to their ability. The course is evaluated as to its effectiveness. The instructional materials are evaluated as they are developed and after they are used. The results of the evaluations are reviewed, made known, and utilized in future offerings.

35. EVALUATION TECHNIQUES USED FOR PARTICIPANTS

This question is closely related to Question #20 on Criteria/Performance Measures. If the evaluation techniques (the "how") to be used in applying the criteria are spelled out in #20, so state. The details do not need to be repeated here.

If not a part of Question #20, describe here any techniques to be used, such as, demonstration, oral interview, written tests, etc. If pre-tests, interim tests, and/or post tests are used, attach copies of each.

VII. FACILITIES

28. PHYSICAL ENVIRONMENT

DESCRIBE THE ROOM(S) AND PHYSICAL LAYOUT (ARRANGEMENTS) TO BE USED.

29. EQUIPMENT

LIST ALL EQUIPMENT TO BE USED AND GIVE QUANTITIES WHERE APPROPRIATE.

30. RESOURCES

LIST THE RESOURCES AVAILABLE TO THE PARTICIPANTS THAT COMPLEMENT OR SUPPLEMENT THIS OFFERING, SUCH AS A LIBRARY, LEARNING RESOURCE CENTER, LABORATORY, OR WORKROOM.

VIII. ADMINISTRATION

31. STRUCTURE

The administrative structure describes the persons involved in planning, developing, and carrying out this offering. It describes those who are responsible and accountable and describes their relationship within the structure of the entire organization.

- Is there one person in charge? By virtue of what -- position or office held? job description? assignment? election? volunteered to act?
- Is there a committee? How formed -- named or elected? standing or ad hoc? Is it a working committee or advisory committee?
- To whom does this group report? How autonomous is the group? Where does final accountability lie?

32. BUDGET

- The total amount budgeted and the breakdown of costs are to be estimated or projected as accurately as possible. Write "N/A" for any categories that do not apply.
- The individual fee or tuition amount is requested as well as an explanation of how it was set.
- The sources of income should be based on the budget amount. The totals of the two should be equal.

In both categories include amounts for services or time that are not direct charges, that is, absorbed by regular overhead or provided by volunteers.

33. PROMOTION [Attach copies of each.]

_____BROCHURE(S)
_____POSTERS
_____CATALOG/ANNOUNCEMENT SCHEDULE
_____DIRECT MAIL LETTER
_____MEMBERSHIP ROLL

_____ADVERTISEMENT(S) IN
  _____NATIONAL PRESS
  _____TRADE PRESS
  _____PROFESSIONAL PRESS
  _____RADIO
  _____TELEVISION
_____PRESS RELEASE TO
  _____NATIONAL PRESS
  _____TRADE PRESS
  _____PROFESSIONAL PRESS
  _____RADIO
  _____TELEVISION
_____OTHER, specify

34. PERMANENT RECORDS AND CERTIFICATES

DESCRIBE WHAT PERMANENT RECORDS ARE KEPT FOR PARTICIPANTS IN THIS OFFERING. IF A CERTIFICATE OR LETTER OF COMPLETION IS ISSUED, PLEASE ATTACH A COPY.

____
____
____
____
____

IX. EVALUATION

35. EVALUATION TECHNIQUES USED FOR PARTICIPANTS

DESCRIBE TECHNIQUES TO BE USED TO EVALUATE THE SUCCESS OF THE PARTICIPANTS IN ACHIEVING THE LEARNING OBJECTIVES.

____
____
____
____
____
____
____

30. PRELIMINARY EVALUATION

Briefly describe all validation, pilot testing, field testing, etc. that was or will be performed in the developmentof this offering. This includes testing of instructional materials and test instruments. Include who tested the material, their characteristics (compare to target audience), and their numbers (how many).

36. IDENTIFICATION OF NEW NEEDS

DESCRIBE WAYS NEW LEARNER NEEDS ARE IDENTIFIED DURING THE COURSE OF THE OFFERING AND HOW THE OFFERING IS ADJUSTED TO MEET THESE NEEDS.

37. EVALUATION TECHNIQUES USED BY THE PARTICIPANTS

DESCRIBE WAYS PARTICIPANTS ARE INVOLVED IN EVALUATING THE CONTENT OF THE OFFERING; THE EFFECTIVENESS OF THE MATERIALS AND METHODS EMPLOYED; THE PERFORMANCE OF THE PRESENTORS AND STAFF; AND THE ADEQUACY AND APPROPRIATENESS OF THE FACILITIES AND EQUIPMENT. [Attach copies of any instruments used.]

38. PRELIMINARY EVALUATION

DESCRIBE ANY VALIDATION AND EVALUATION PERFORMED IN THE DEVELOPMENT OF THE OFFERING, INSTRUCTIONAL MATERIALS, AND/OR TEST INSTRUMENTS.

39. OUTSIDE EVALUATION

DESCRIBE ANY EVALUATION PERFORMED BY AN OUTSIDE OR UNBIASED, QUALIFIED PERSON (EXPERT). SPECIFY WHO, THEIR CREDENTIALS, WHAT WAS REVIEWED/EVALUATED, AT WHAT POINT IN TIME, AND HOW THE RESULTS WERE USED.

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

This application is formatted so that required information will be written on separate paper with each answer taking as much space as is necessary. If the information requested already exists in another format, it can be appended. Each question number and the key term or short phrase used to identify it must be stated before the answer or information is written and must be clearly marked on all attachments submitted with the application. The attachments should be submitted in the sequence of the question numbers.

FOR INTERNAL USE ONLY

*Date of receipt*________________

*Application #*__________________

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

I. TYPE OF APPLICATION

1. INITIAL APPLICATION_____ RENEWAL____ DATE OF CURRENT APPROVAL_______________

II. SPONSOR/PROVIDER INFORMATION

2. SPONSOR/PROVIDER

3. CLENE NATIONAL CONTINUING EDUCATION REGISTRY SPONSOR CODE ____ ____ ____ ____

4. TYPE OF PROVIDER [Select from list]

5. CO-SPONSOR, IF ANY

III. OFFERING INFORMATION

6. TITLE OF OFFERING

7. TYPE OF OFFERING [Select from list]

8. FREQUENCY OF OFFERING

THE OFFERING IS TO BE PRESENTED: _____ONCE _____MORE THAN ONCE

9. TIME SCHEDULE

10. UNIT OF MEASURE

THIS OFFERING REPRESENTS _______CONTACT HOURS.

11. CLENE NATIONAL CONTINUING EDUCATION REGISTRY COURSE NUMBER ____ ____ ____ ____

12. DATE(S) AND LOCATION(S)

BEGINNING DATE	ENDING DATE	CITY	STATE	MEETING PLACE

IV. RATIONALE

13. PURPOSE OF THE OFFERING, I.E., REASONS FOR PRESENTING THE OFFERING

14. SCOPE OF THE SUBJECT CONTENT

15. TARGET AUDIENCE [Select from list]

16. LEVEL OF THE OFFERING [Select from list]

17. NEEDS ASSESSMENT [Attach copies of any instruments]

18. PREREQUISITES [Attach copies of any instruments or materials used]

V. INSTRUCTIONAL DESIGN

19. LEARNING OBJECTIVES

20. CRITERIA/PERFORMANCE MEASURES [Attach copies of any instruments]

21. MODE [Select from list]

22. METHOD OF DELIVERY [Select from list]

23. FORMAT, METHODS, AND MATERIALS [Select from list]

24. INDIVIDUALIZATION

VI. HUMAN RESOURCES

25. DESIGN/DEVELOPMENT TEAM

NAME	FUNCTION	EXPERTISE/CREDENTIALS

PROCESS FOLLOWED IN DESIGNING AND DEVELOPING THE OFFERING

26. FACULTY

NAME	FUNCTION	EXPERTISE/CREDENTIALS

CRITERIA USED FOR SELECTION OF FACULTY/PRESENTORS

27. SUPPORT PERSONNEL

VII. FACILITIES

28. PHYSICAL ENVIRONMENT

29. EQUIPMENT

30. RESOURCES

VIII. ADMINISTRATION

31. ADMINISTRATIVE STRUCTURE

32. BUDGET

TOTAL AMOUNT BUDGETED

BREAKDOWN OF COSTS

FEE/TUITION PER PERSON

SOURCES OF INCOME

33. PROMOTION [Attach copies of each]

34. PERMANENT RECORDS AND CERTIFICATES [Attach copies]

IX. EVALUATION

35. EVALUATION TECHNIQUES USED FOR PARTICIPANTS [Attach copies of instruments]

36. IDENTIFICATION OF NEW NEEDS

37. EVALUATION TECHNIQUES USED BY THE PARTICIPANTS [Attach copies of instruments]

38. PRELIMINARY EVALUATION

39. OUTSIDE EVALUATION

40. FEEDBACK OF EVALUATION RESULTS

41. ADJUSTMENTS AND GRIEVANCES

GUIDELINES AND INSTRUCTIONS

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

I. TYPE OF APPLICATION

1.
- If the offering is being reviewed for the first time, check Initial Application.
- If the offering is currently approved and this review is to extend or renew the approval, check Renewal. Give the date the current approval was granted.
- If the offering was previously reviewed and approval was denied, check Initial Approval.

II. SPONSOR/PROVIDER INFORMATION

2. SPONSOR/PROVIDER

List the

- Name of the sponsor/provider
- Division, chapter, section, or other administrative unit which is responsible for creating the offering
- Address
- Telephone number with extension, if any, for the administrative unit.

3. CLENE NATIONAL CONTINUING EDUCATION REGISTRY SPONSOR CODE

Every sponsor is assigned a four letter code at its first entry into the Registry. This code is used by the sponsor for its life in the Registry.

If this code has been assigned for your unit, please fill in the blanks.

4. TYPE OF PROVIDER

Please select the category that best describes your organization or if "Other," specify the type of provider you are.

- Academic Institution
  - Graduate Program
  - Bachelors Program
  - Associates Program
  - University/College Extension
- State Library and/or Media Agency
- Organization or System
- Network
- Information system supplier/vendor/broker
- Professional Association
  - International
  - National
  - Multistate
  - State
  - Local
- Other, specify

5. CO-SPONSOR, IF ANY

If the development and/or presentation of this offering is a joint venture, provide the information for each co-sponsor.

5. CO-SPONSOR, *continued*

- Name, address, and telephone number for the co-sponsor
- Person responsible for administration of the offering and their position title.
- The type of provider they are. Select the appropriate type from the list in Question #4.
- Role and responsibilities of the co-sponsor in planning, development, and administration of the offering.

III. OFFERING INFORMATION

6. TITLE OF OFFERING

Indicate the title of the offering as it will be announced, promoted, and listed in the National Registry. Distinguish, if different.

7. TYPE OF OFFERING

Please select the category that best describes your offering or if "Other," specify the correct type.

Academic course
Academic independent study
Internship or practicum
Home Study course
Correspondence course
Institute
Workshop
Seminar
Short course
Conference program
Mediated learning module
Computer-assisted instruction module
Programmed text
Other, specify

8. FREQUENCY OF OFFERING

Check the appropriate response.

9. TIME SCHEDULE

Describe

- the number of sessions for the offering
- the length of each session in hours, minutes, or hours and minutes
- the schedule for the sessions, i.e., daily, weekly, twice weekly, or other specified. If the pattern varies with repeated presentations, give the details of each.

If the offering is a self-instructional package, omit the first section and indicate

- the number of units in the package
- the time it is estimated to complete the package in hours, minutes, or hours and minutes as appropriate.

10. UNIT OF MEASURE

Indicate what kind of credit, if any, is to be awarded for this offering and the number of units.

Academic credits--semester hours

Academic credits--trimester hours

Academic credits--quarter hours

Continuing Education Units (CEU)

Other, specify

All offerings must be assigned a number of contact hours or the equivalent credit to contact hours must be computed.

11. CLENE NATIONAL CONTINUING EDUCATION REGISTRY COURSE NUMBER

If this is a re-application for approval, fill in the Registry Course Number previously assigned.

12. DATE(S) AND LOCATION(S)

Give the following information for each of the scheduled presentations of the offering.

- Beginning date. The date of the first session.
- Ending date. The date of the last session.
- The city and state where the offering is to be held.
- The meeting place (building and room) where the offering is to be held.

IV. RATIONALE

13. PURPOSE OF THE OFFERING, I.E., REASONS FOR PRESENTING THE OFFERING

Make a short statement on why this offering is being presented and the purposes it is to serve.

14. SCOPE OF THE SUBJECT CONTENT

Make a short statement that describes the topics to be covered and the scope of each including the level of complexity. A content outline that reflects the range of the subject matter written in a manner similar to a course description would be appropriate.

15. TARGET AUDIENCE

Describe the intended target audeince by selecting the appropriate categories and putting a P for Primary and an S for Secondary for all appropriate groups. There can be more than one primary group and more than one secondary group defined as the intended audience for the offering.

16. LEVEL OF THE OFFERING

Indicate the level of the material in the offering in terms of the target audience and put a P for Primary group and an S for Secondary group (as expressed in Question #15) for the appropriate description:

Overview/Summary. A general coverage of the information in its basic framework to present a complete but limited view of the subject.

16. LEVEL OF THE OFFERING, *continued*

State-of-the-Art Survey. A comprehensive, in depth presentation of the subject giving the most current information in the field.

Refresher/Review. A review of the subject which can include "how-we-did-it" reports.

Basic Instruction. Elementary material on "new" subjects for novice participants.

Intermediate Instruction. Material beyond the fundamental level on "new" subjects.

Advanced Instruction. Material is based on intermediate pre-requisite knowledge and/or skills.

Issues, Problems, Trends. Emphasis on theory, future directions, and projections rather than on methodology or facts.

For example, an offering designed as intermediate instruction for a paraprofessional might serve as a refresher/review for a professional.

S - Refresher/Review

P - Intermediate Instruction

17. NEEDS ASSESSMENT

If needs analyses were performed that (1) led to the creating of this offering, or (2) defined the content, approach, level, etc. of this offering, please so state. Describe

- the nature of the assessment, such as peer review findings, self-felt needs of the target audience, or faculty/administrator perceived needs
- procedures followed including when (date) the analyses occured
- instruments used such as questionnaires or structured interview schedules. (Submit copies of any instruments used as supplementary documentation to accompany this Form.)

18. PREREQUISITES

Some offerings are designed for participants who possess certain competancies, e.g., skills, knowledge (facts), or understanding of concepts, at the beginning of the activity. These entry level competencies are based on the Level of the Offering (Question #16) and the primary and secondary target audiènce groups. They can be stated as performance criteria, as previous completion of specific offerings or courses, or preassigned readings. They can be tested for with a written instrument.

List any prerequisites established for this offering and specify for which target group (primary or secondary) if there is a difference. Include copies of lists of terms, assigned reading lists, entry level tests, and any other relevant materials.

V. INSTRUCTIONAL DESIGN

19. LEARNING OBJECTIVES

A learning objective is a statement of specific learning achievement to be gained from a learning experience. They restate the Rationale (purpose, scope, and level of the offering) in performance or behavioral terms and specify what the participant will be able to do or can expect to gain from attending. Each objective states the performance and the conditions.

Performance -- it specifies what a participant can expect to be able to do upon completion of the learning experience

Conditions -- it describes the major conditions (if any) under which the performance is to occur.

Some learning objectives are written in such a manner that the criterion is also included.

Criterion -- it indicates the criterion of acceptable performance, that is, it specifies how well the participant must perfrom in order to demonstrate that the Objective has been achieved.

(See next Question #20)

Learning objectives must be written for the offering. List the learning objectives for this offering.

20. CRITERIA/PERFORMANCE MEASURES

Criteria specify the expected outcomes for the participant in terms of the level of knowledge, attitude, or performance skill that is expected to be attained. Each learning objective should have a performance measure expressed to use to determine if the objective has been achieved. (This is often written as part of the learning objective.) The entire offering should have stated criteria to use to determine if the unit of measure (CEU, credit, etc.) should be awarded.

- List the criterion/performance measure for each learning objective. If this is included in the learning objectives, so state. You do not need to repeat the criteria here.
- List the criteria for the offering that represents "satisfactory completion" which allows award of credit, CEU, etc.

Attach copies of any instruments (e.g., tests) used in measuring the performance.

21. MODE

State the modes of instruction that will be used, expressed as a percentage. The percentage will be a rough estimate of the time spent in each type of grouping.

___% Independent Study: one-to-one tutorial or individualized instruction

___% Small Group: no more than 15 persons

___% Large Group: more than 15 persons

22. METHOD OF DELIVERY

The method of delivery is the major means used to communicate with the participant. Any of these methods could be used as a teaching aid or an instructional strategy. (See Question #23) However, the main delivery processes are to be described here.

State of the main methods of delivery, expressed in percentage of the total offering. (A rough estimate is adequate.)

Live Presentation

Radio

Television

Satellite

Print

Computer-Assisted

Mail (Correspondence)

Telephone

23. FORMAT, METHODS, AND MATERIALS

The instructional strategies to be employed in this offering are to be described.

- Choose as many from the list below as is appropriate.
- The number of hours each is used or the percentage of the whole offering this technique represents is requested. The total number of hours expressed and/or the total percentages will probably exceed the whole due to the techniques being used simultaneously.
- Those techniques that represent or involve use of specific materials or products are to be designated as to source:
  - a. custom/internally developed -- those materials designed and developed specifically for this offering
  - b. external/commercially developed -- existing materials selected for use in this offering.

Audio tapes or cassettes
Case study materials
Computer-assisted instruction
Demonstration
Diagnostic tests
Discussion
Field experience
Films
Games
Laboratory work
Lectures
Maps, charts, etc.
On-site visits
Overhead projection
Panel presentations
Picture Boards
Programmed instruction (Self teaching devices)

Problem sets and exercises
Question and answer
Radio
Reading material/text
Realia, models, etc.
Resource persons
Role-playing exercises
Simulation methods
Slides/filmstrips
Syllabus (Outlines and handouts)
Team teaching
Telephone (Conference calls)
Television
Tests
Video tapes or cassettes
Workbook
Other, specify

For example:

Lectures 60%

Discussion 40%

Overhead projection 40% Custom developed

Film 5% Commercially developed

24. INDIVIDUALIZATION

Individuals vary in their learning styles, preferences for media, speed in learning, and incoming level of competence.

Make a brief list of all of the techniques or opportunities in the learning strategies that allow for individualization of the learning. If no opportunities are provided, write "none."

VI. HUMAN RESOURCES

25. DESIGN/DEVELOPMENT TEAM

A number of skills and areas of expertise are needed to design and develop an educational offering. These skills are often brought to bear on an offering through use of a team or persons. The roles represented by the team include:

policy-maker
administrator
curriculum specialist
instructional techniques specialist
media production specialist
subject content specialist
presentor (persons who conduct learning sessions)

Describe the members of your design/development team

- Give the person's name
- State the function(s) or role this person performed on the team
- Briefly describe the qualifications of the person in terms of the functions performed on the team. The qualifications may be from education, job, or experience in that area.

Describe the process followed in designing and developing the offering. Include development of the content, design of the instructional strategies, selection of the instructional materials, and determination of the evaluation techniques.

26. FACULTY

The faculty or presentors include all persons who conduct learning sessions, such as, lecturers, members of panels, moderators or discussion leaders, resource experts for discussion sessions, instructors for demonstrations, and those who prepare and present cases for group discussion. The faculty should have expertise in the subject content, techniques of teaching/learning, and communications skills.

Describe the members of your faculty

- Give the name of each faculty member for this offering
- State the function he/she performs
- Describe briefly the qualifications the person possess to serve in this faculty position. [A vita may be profided for this section.]

State the criteria used for selection of faculty/presentors.

27. SUPPORT PERSONNEL

Beyond the tasks performed by the design team and the faculty, many duties of a support nature msut be handled. These include typing, reproduction, registration, recordkeeping, equipment maintenance, equipment operation, and facility set-up.

- List the functions that have or will be performed to support this offering by others than the design team and faculty.
- Estimate the number of hours that will be spent on each function.

Note: When a member of the design team or the faculty perform a support function, it should be omitted from this question.

VII. FACILITIES

28. PHYSICAL ENVIRONMENT

- Describe the rooms to be used for this offering. Include dimensions and relevant features, i.e., stage, slanted floor, projection room, etc.
- Describe the layout of the room in terms of where seating is to be placed, podium if any, projection screens and equipment, and any other relevant equipment.
- Describe the furniture for the participants in terms of kinds of chairs, tables or desks available, permanently affixed or movable.

29. EQUIPMENT

List all equipment that will be used in this offering. Include quantities of each. This will include audio-visual equipment demonstration equipment, and equipment for participants' use in a hands-on or laboratory format.

For example: *16mm film projector - 1*
movie screen - 1
video tape playback unit - 1
video monitors - 3
microphones - 2
speakers - 4
computer terminals - 3
telephone for hook-up - 3

30. RESOURCES

Briefly describe any resources that are available to the participants that will complement or supplement the instructional strategies of this offering; for example, a library or a special library collection; a learning laboratory or learning resource center with self-instructional materials; a laboratory; or a workroom.

VIII. ADMINISTRATION

31. ADMINISTRATIVE STRUCTURE

The administrative structure describes the persons involved in planning, developing, and carrying out this offering. It describes those who are responsible and accountable and describes their relationship within the structure of the entire organization.

- *Is there one person in charge? By virtue of what -- position or office held? job description? assignment? election? volenteered to act?*
- *Is there a committee? How formed -- named or elected? standing or ad hoc? Is it a working committee or advisory committee?*
- *To whom does this group report? How autonomous is the group? Where does final accountability lie?*

Describe the administrative sturcutre: the persons involved, their function, their terms, the selection process, the relationship to the larger organization, and the accountability arrangement.

32. BUDGET

Total amount budgeted should be listed.

52. BUDGET, *continued*

Breakdown of costs are to be estimated or projected as accurately as possible using the following categories.

- Honoraria for faculty--speakers, panel members, resource persons
- Salaries for development team, administrators, and support personnel
- Supplies/equipment related to learning
- Printing/mailing of promotional material
- Travel
- Room rental
- Meals/refreshments
- Other, specify

The individual fee or tuition amount is requested as well as an explanation of how it as set.

Sources of income should be listed based on the budget amount. The totals of the two should be equal. Use the following categories.

- Tuition charges
- Gifts and/or grants
- Contribution of time or serivces
- Overhead provided and/or absorbed by organization
- Other, specify

Note: In both breakdown of costs and sources of income, include amounts for services or time that are not direct charges, that is, absorbed by regular overhead or provided by volunteers.

53. PROMOTION

Select those techniques used to promote this offering. Attach copies of materials used, where possible.

- Brochures
- Posters
- Catalog/announcement schedule
- Direct mail letter
- Membership roll
- Advertisements in
  - National press
  - Trade press
  - Professional press
  - Radio
  - Television
- Press releases to
  - National press
  - Trade press
  - Professional press
  - Radio
  - Television
- Other, specify

34. PERMANENT RECORDS AND CERTIFICATES

- Briefly describe what, if any, permanent records are kept for participants in this offering. How long are they kept? How are they made available, e.g., transripts?
- If a letter of completion or a certificate is issued to participants, so state and attach a copy.

IX. EVALUATION

Evaluation occurs at several levels and at many times throughout the course of an offering. Participants are evaluated as to their achievement. Faculty are evaluated as to their ability. The course is evaluated as to its effectiveness. The instructional materials are evaluated as they are developed and after they are used. The results of the evaluations are reviewed, made known, and utilized in future offerings.

35. EVALUATION TECHNIQUES USED FOR PARTICIPANTS

Describe the techniques to be used to evaluate the success of the participants in achieving the learning objectives.

- This question is closely related to Question #20 on Criteria/Performance Measures. If the evaluation techniques (the "how") to be used in applying the criteria are spelled out in #20, so state. The details do not need to be repeated here.
- If not a part of Question #20, desribe here any techniques to be used, such as, demonstration, oral interview, written tests, etc. If pre-tests, interim tests, and/or post-tests are used, attach copies of each.

36. IDENTIFICATION OF NEW NEEDS

- Briefly describe techniques that will be used to identify needs of participants that vary from those established at the beginning and on which the offering was designed to meet.
- Describe how the offering will be adjusted to meet these needs.

37. EVALUATION TECHNIQUES USED BY THE PARTICIPANTS

Decribe ways participants are involved in evaluating:

- the content of the offering
- the effectiveness of the materials and methods employed
- the performance of the presentors and staff
- the adequacy and appropriateness of the facilities and equipment

Describe the techniques that will be used to elicit the comments and opinions of the participants, such as an Audience Reaction Form or a grievance procedure

List those aspects of the offering that will be covered.

Attach copies of any instruments that will be used.

38. PRELIMINARY EVALUATION

Briefly describe all validation, pilot testing, field testing, etc. that was or will be performed in the development of this offering. This includes testing of instructional materials and test instruments. Include who tested the material, their characteristics (compare to the target audience), and their

39. OUTSIDE EVALUATION

If, at any point in the development or presentation of this offering, a panel or an outside or unbiased, qualified person is used for evaluation, so state and describe. Specify who, their credentials, what was reviewed/evaluated, at what point in time, and how the results were used.

40. FEEDBACK OF EVALUATION RESULTS

For all the evaluation performed, describe who receives the results, when they receive it, and how the results will be utilized.

41. ADJUSTMENTS AND GRIEVANCES

- State the policy on refunds, cancellation, late registration, and dropping out.
- State the grievance policy and procedures available to participants.

APPLICATION FOR APPROVAL OF A SINGLE OFFERING

ADDENDUM GUIDELINES AND INSTRUCTION FOR INDIVIDUALIZED PROGRAMS AND ACTIVITIES

These guidelines and instructions cover the application for approval of instructional packages that are developed for generalized multiple users but are designed to be used independently in a self-instructional mode. Examples of such packages include correspondence courses, programmed texts, computer-assisted instruction modules, and mediated learning modules or kits.

NOTE: While Home Study Courses are a type of correspondence course, they have to meet specific qualifications and criteria set down by the Home Study Council in order to accurately carry the Home Study designations. The Standards for Home Study Courses are available separately.

As stated in the Criteria for Quality, these packages must follow the general criteria as wel as those specifically stated for Individualized Programs and Activities and for Instructional Materials. In most cases, the Criteria cannot be applied without first hand examination of the package and therefore, a copy of the instructional package must be provided along with th application.

Using the Application for Approval of a Single Offering as the basic document, the following guidelines are to augment the standard instructions and amplify and clarify those questions that are most pertinent for individualized packages.

Use these instructions along with the standard Guidelines and Instructions for Application fo Approval of a Single Offering.

II. SPONSOR/PROVIDER INFORMATION

1. If this offering has been approved in another format, e.g., as a group instruction offering, check renewal, add an asterisk, and give the date the current approval was granted.

Renewal ✓ *

III. OFFERING INFORMATION

2. TITLE OF OFFERING

If this offering has been approved as another type of offering, the titles must differ enough to distinguish them in the National Registry.

8. FREQUENCY OF OFFERING

Check "MORE THAN ONCE".

9. TIME SCHEDULE

Complete the second section on number of units and length of time to complete the package.

11. CLENE NATIONAL CONTINUING EDUCATION REGISTRY COURSE NUMBER

This offering must have its own unique course number even if the offering has been entered for a different type of format.

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12. DATE(S) AND LOCATION(S)

- The beginning date is the date the package will be available for use.

- Location is appropriate only for those packages that are "location-bound", such as a computer-assisted instructional program offered at selected sites.

IV. RATIONALE

18. PREREQUISITES

Prerequisites are very important in self-instructional packages. Entry-level competencies must be specified. They must match the target audience and the level of offering.

V. INSTRUCTIONAL DESIGN

19. LEARNING OBJECTIVES

The learning objectives should be in performance or behavioral terms. They should match the target audience and the level of the offering.

20. CRITERIA/PERFORMANCE MEASURES

The criteria and performance measures must be specified. Means of determining if the criteria or performance measures have been met must be developed.

24. INDIVIDUALIZATION

The fact that the package is designed for self-instruction does not assure individualization. Describe if there are opportunities for self-pacing, branching, choice of media, skipping sections if competence is present, etc.

VI. HUMAN RESOURCES

25. DESIGN/DEVELOPMENT TEAM

- Careful attention will be given to the members of the design/development team to assure that the full range of skills has been brought to bear on this offering.

- The process of designing and developing the offering should include details on production, pilot testing, field testing, revisions, and updating.

26. FACULTY

There may not be any faculty as such.

VII. FACILITIES

28. PHYSICAL ENVIRONMENT

This should describe any special requirements for use of the instructional packages.

29. EQUIPMENT

This should specify any equipment needed for this instructional package.

30. RESOURCES

There may not be any resources, especially if this is a commercially sold product, but if any consultation, testing, scoring, or referral is available to a learner, so state.

IX. EVALUATION

35. EVALUATION TECHNIQUES USED FOR PARTICIPANTS

This should be expanded to include the process of monitoring the learner's progress and any feedback and/or interaction procedures provided.

36. IDENTIFICATION OF NEW NEEDS

This should include procedures for feedback and/or interaction. It could also take the form of references for further study or referral to a resource network.

38. PRELIMINARY EVALUATION

This is an extremely important aspect in the design/development of an instructional package. Considerable attention will be given to this question.

40. FEEDBACK OF EVALUATION RESULTS

This question should be expanded to include the policy and mechanism for updating the content and the methodologies of this offering.

Beyond the information given in response to the 41 questions on the Form, the actual instructional package will be reviewed in the following areas:

- Are the instructional methods and materials

  --varied as to purpose
  --suitable for the mode
  --current and timely
  --matched as to content and attributes of the media
  --acceptable in technical quality?

- Is there an adequate instructor's kit?

- Is there an adequate learner's kit?

- Are learning activities appropriate

  --to learning objectives
  --to target audience
  --to level of offering
  --to mode
  --to time allocated?

- Are learning activities adequately

  --organized
  --sequenced
  --paced?

APPLICATION FOR APPROVAL OF A LEARNING CONSULTANT

This application is formatted so that required information can be written in immediately following the question. If this is not enough space or if the information requested already exists in another format, information can be appended to the form. At the specific place in the form, mark "See attached." For each attachment, clearly mark at the top of the page the question number it is answering and a short phrase or key terms to identify the subject of the question. The attachments should be forwarded with the application sequenced numerically to conform with the questions.

FOR INTERNAL USE ONLY

*Date of receipt*________________

*Application #*________________

DEFINITION

A Learning Consultant works with a learner

- in a one-to-one relationship
- based on the learner's specific needs
- developing learning objectives for the learner each time
- designing learning strategies to meet the learner's needs and objectives
- monitoring and evaluating the learner's success in meeting the objectives

APPLICATION FOR APPROVAL

This application is based on the Criteria for Quality "Individualized Programs and and Activities" and "Criteria for Learning Consultants" and approval will be based on how well you meet and are compatable with these criteria.

4. QUALIFICATIONS

Your qualifications could come from formal education (degrees or advanced certificates); continuing education and/or training in educational methodology and subject areas; formal employment experience in teaching/education and subject areas; or professional experience such as consulting.

APPLICATION FOR APPROVAL OF A LEARNING CONSULTANT

I. TYPE OF APPLICATION

1. INITIAL APPLICATION________

RENEWAL________ DATE OF CURRENT APPROVAL____________________

II. PERSONAL INFORMATION

2. LEARNING CONSULTANT

NAME____

ADDRESS____

____

TELEPHONE____________________EXTENSION________

3. EMPLOYMENT

PLACE OF EMPLOYMENT____

POSITION TITLE____

4. QUALIFICATIONS

WE ARE INTERESTED IN WHAT CREDENTIALS YOU HAVE THAT QUALIFIES YOU AS A LEARNING CONSULTANT. PLEASE SUBMIT YOUR VITA AND ANY ADDITIONAL INFORMATION SHOWING THE SCOPE OF YOUR PARTICIPATION IN ADULT LEARNING PROJECTS.

III. CLIENTELE

5. TYPES OF CLIENTS/LEARNERS

BASED ON THE FOLLOWING LIST, DESCRIBE THE TYPES OF CLIENT/LEARNERS YOU ANTICIPATE WORKING WITH. GIVE ESTIMATES OF PERCENTAGES FOR EACH.

_____CLERICAL/SUPPORT PERSONNEL____%

_____LIBRARY TECHNICAL ASSISTANTS____%

_____MEDIA TECHNICIANS____%

_____PARAPROFESSIONALS (LIBRARY ASSOCIATES ____%

_____LIBRARIANS____%

_____MEDIA SPECIALISTS____%

_____ADMINISTRATORS____%

_____TECHNICAL INFORMATION SPECIALISTS ____%

_____SPECIALISTS (IN SYSTEM ANALYSIS, PROGRAMMING, PERSONNEL, BUDGET, PUBLIC RELATIONS, ETC.)____%

_____TRUSTEES____%

_____VOLUNTEERS____%

_____FRIENDS GROUP MEMBERS____%

_____USERS____%

_____OTHERS, specify

_______________________ ____%

_______________________ ____%

7. SCOPE OF SERVICES

- Overview/Summary. A general coverage of the information in its basic framework to present a complete but limited view of the subject.
- State-of-the-Art Survey. A comprehensive, in-depth presentation of the subject giving the most current information in the field.
- Refresher/Review. A review of the subject which can include "how-we-did-it" reports.
- Basic Instruction. Elementary material on "new" subjects for novice participants.
- Intermediate Instruction. Material beyond the fundamental level on "new" subjects.
- Advanced Instruction. Material is based on intermediate prerequisite knowledge and/or skills.
- Issues, Problems, Trends. Emphasis on theory, future directions, and projections rather than on methodology or facts.

5. TYPES OF CLIENTS/LEARNERS, *continued*

STATE THE RATIONALE OF YOUR ESTIMATES. ARE CERTAIN GROUPS AVAILABLE TO YOU? WILL YOU SEEK ONLY CERTAIN TYPES? WILL YOUR EXCLUDE CERTAIN TYPES?

6. LEARNING CONSULTANT/LEARNER RELATIONSHIP

STATE YOUR PERCEPTION OF THE RELATIONSHIP BETWEEN THE LEARNING CONSULTANT AND THE LEARNER.

7. SCOPE OF SERVICES

STATE THE SUBJECT AREAS IN WHICH YOU ARE QUALIFIED AND WILLING TO DESIGN AND OVERSEE A LEARNING PLAN.

These subject areas can be work related, e.g., cataloging, reference, or collection development, or they can be descipline related, e.g., fine arts, social science, technology, law, medicine, etc.

FOLLOWING EACH LISTING, PLEASE INDICATE THE TYPE AND LEVEL OF LEARNING PLAN PLUS THE LEVEL OF INSTRUCTION SELECTED FROM THE FOLLOWING LIST:

A. OVERVIEW/SUMMARY
B. STATE-OF-THE-ART SURVEY
C. REFRESHER/REVIEW
D. BASIC INSTRUCTION
E. INTERMEDIATE INSTRUCTION
F. ADVANCED INSTRUCTION
G. ISSUES, PROBLEMS, TRENDS

ANOTHER OPTION OPEN TO LEARNING CONSULTANTS IS TO ACCEPT STUDENTS IN ANY DISCIPLINE WORKING AS A MENTOR. IF YOU WISH TO SERVE AS A MENTOR, SO STATE PLUS THE LEVEL OF INSTRUCTION YOU WILL SERVE UNDER.

8. SAMPLE LEARNING PLAN

- Describe needs assessment techniques. [Attach copies of any instruments you have developed.]
- Describe techniques used for individualization in such areas as learning styles, pacing, and media preferences.
- Describe procedures for monitoring the progress of the learner.
- Describe techniques for evaluating the learner's attainment of the learning goals and objectives. [Attach copies of sample instrument, if used.]

IV. DESIGN AND DEVELOPMENT OF LEARNING PLANS

8. SAMPLE LEARNING PLAN

SELECT ONE OF THE ITEMS ABOVE (IN QUESTION #7) AND ATTACH A SAMPLE LEARNING PLAN WITH AN EXPLANATION OF THE PROCESS THAT WOULD BE FOLLOWED.

Be sure to incorporate the philosophy that this plan is a joint project that you and your learner constructed. (See Criteria for Quality "Individualized Programs and Activities" and "Criteria for Learning Consultants.")

9. TYPES OF ACTIVITIES

MUCH OF A LEARNING PLAN INVOLVES SELECTING THE APPROPRIATE ACTIVITIES TO PROVIDE THE EXPERIENCES, KNOWLEDGE, OR SKILLS NECESSARY TO MEET THE LEARNING OBJECTIVES. IN THIS AREA, A LEARNING CONSULTANT SERVES AS A BROKER OR REFERRAL AGENT. CHECK THE ITEMS YOU HAVE IN-DEPTH KNOWLEDGE OF WHAT IS AVAILABLE IN YOUR FIELD OF EXPERTISE AND CAN DRAW FROM IN PREPARING A LEARNING PLAN.

ACADEMIC COURSES
  _____ASSOCIATE LEVEL
  _____BACHELORS LEVEL
  _____MASTERS LEVEL
  _____POST-MASTERS LEVEL
_____ACADEMIC INDEPENDENT STUDY
_____HOME STUDY COURSES
_____CORRESPONDENCE COURSES
_____INSTITUTES
_____WORKSHOPS
_____SEMINARS
_____SHORT COURSES
_____CONFERENCE PROGRAMS
_____MEDIATED LEARNING MODULES

_____COMPUTER-ASSISTED INSTRUCTION MODULES
_____PROGRAMMED TEXTS
_____STUDY GROUPS
_____LECTURE SERIES
_____JOURNAL CLUBS
_____LIBRARY PERSONNEL INTERCHANGES
WRITING AND HAVING PUBLISHED
  _____BOOKS
  _____JOURNAL ARTICLES
_____TEACHING AND/OR DEVELOPING A COURSE
_____CONSULTING
PREPARING AND SHOWING
  _____AN EXHIBIT
  _____AN A-V PRESENTATION

10. FORMATS, METHODS AND MATERIALS

CHECK THE FOLLOWING LIST OF FORMATS, METHODS, AND MATERIALS THAT YOU ARE QUALIFIED TO SELECT, OVERSEE USE OF IN LEARNING STRATEGIES FOR A LEARNING PLAN, AND HAVE ACCESS TO.

_____AUDIO TAPES OR CASSETTES
_____CASE STUDY MATERIALS
_____COMPUTER-ASSISTED INSTRUCTION
_____DEMONSTRATION
_____DIAGNOSTIC TESTS
_____FIELD EXPERIENCE
_____FILMS
_____GAMES
_____LABORATORY WORK

_____MAPS, CHARTS, ETC.
_____ON-SITE VISITS
_____PICTURE BOARDS
_____PROGRAMMED INSTRUCTION (SELF-TEACHING DEVICES)
_____PROBLEM SETS AND EXERCISES
_____QUESTION AND ANSWER
_____RADIO
_____READING MATERIAL/TEXT

10. FORMATS, METHODS AND MATERIALS, *continued*

_____REALIA, MODELS, ETC.

_____RESOURCE PERSONS

_____ROLE-PLAYING EXERCISES

_____SIMULATION METHODS

_____SLIDES/FILMSTRIPS

_____OTHER, specify

_____SYLLABI (OUTLINES AND HANDBOOKS)

_____TELEVISION

_____TESTS

_____VIDEO TAPES OR CASSETTES

_____WORKBOOKS

________________________ ________________________

11. INSTRUCTIONAL MATERIALS

LIST YOUR CRITERIA FOR SELECTION OF MEDIA AND FOR SELECTION OF INSTRUCTIONAL MATERIALS IN DEVELOPING LEARNING STRATEGIES.

V. EVALUATION

12. EVALUATION OF YOUR ROLE AS A LEARNING CONSULTANT

DESCRIBE ANY PROCESSES THAT WILL BE USED TO EVALUATE YOUR OVERALL APPROACH AND PERFORMANCE AS A LEARNING CONSULTANT.

13. GRIEVANCES

STATE WHAT YOUR POLICY IS ON HANDLING A CLIENT'S GRIEVANCES.

VI. RESOURCES

14. LEARNING CONSULTANT'S RESOURCES

DESCRIBE THE PHYSICAL RESOURCES AVAILABLE TO YOUR SUCH AS, DARKROOM, A-V PRODUCTION LABORATORY, A-V MATERIALS COLLECTION, CURRICULUM DEVELOPMENT LIBRARY, COMPUTER ACCESS (TERMINAL AND TIME), TESTING CENTER, ETC.

15. LEARNER'S RESOURCES

DESCRIBE THE PHYSICAL RESOURCES THAT CAN BE MADE AVAILABLE TO YOUR LEARNERS IN ACCOMPLISHING THEIR LEARNING PLANS, SUCH AS, LIBRARY, SPECIAL COLLECTIONS, LEARNING RESOURCE CENTER, WORKROOM, LABORATORY, ETC.

16. HUMAN RESOURCES

DESCRIBE THE HUMAN RESOURCES AVAILABLE TO YOUR OR TO YOUR LEARNER. INDICATE THEIR AREAS OF EXPERTISE AND THEIR AFFILIATION (FOR EXAMPLE, PLACE OF EMPLOYMENT).

VII. ADMINISTRATIVE SERVICES

17. ADMINISTRATIVE STRUCTURE

DESCRIBE YOUR POSITION AS A LEARNING CONSULTANT WITHIN THE STRUCTURE OF THE LARGER ORGANIZATION OR AGENCY, IF APPLICABLE. DO YOU HAVE A "BOSS" OR ADMINISTRATOR? ARE YOU COMPLETELY AUTONOMOUS? DOES THE ACCOUNTABILITY REST SOLELY WITH YOU? FOR ALL AREAS, SUCH AS, BUDGET, FEES, CLIENTELE, FACILITIES, PROMOTION, ETC.?

18. SUPPORT PERSONNEL

DESCRIBE ANY SUPPORT PERSONNEL AVAILABLE TO YOU AS A LEARNING CONSULTANT. INDICATE THE FUNCTIONS THEY PERFORM, THE TIME AVAILABLE TO YOU (PERCENTAGE OF FULL TIME), AND HOW THE CHARGING FOR THEIR SERVICES IS HANDLED.

19. CONTRACT POLICY

DESCRIBE YOUR CONTRACT POLICY AND PROCEDURES WITH THE LEARNER/CLIENT.

20. FEES

DESCRIBE YOUR POLICY ON THE CHARGING OF FEES FOR YOUR SERVICES. IF NO FEES ARE CHARGED, SO STATE. IF FEES ARE CHARGED, STATE HOW THE RATES ARE COMPUTED AND ANY SCHEDULE THAT MIGHT BE USED.

DESCRIBE HOW YOUR SERVICES AS A LEARNING CONSULTANT ARE FUNDED. INCLUDE: SALARY, IF ANY; OVERHEAD (OFFICES, UTILITIES, ETC.); SUPPLIES AND EQUIPMENT FOR INSTRUCTIONAL USE; PROMTIONAL COSTS; AND GENERAL ADMINISTRATIVE COSTS (OFFICE SUPPLIES, CLERICAL SUPPORT, ETC.). STATE THE SOURCES OF THE FUNDS AND/OR CONTRIBUTED SERVICES.

21. RECORDKEEPING

DESCRIBE THE FILES YOU MAINTAIN AS A RECORDKEEPING SYSTEM FOR YOUR CLIENT/LEARNERS. DO YOU ISSUE "TRANSCRIPTS," CERTIFICATES OF COMPLETION, OR OTHER SUCH DOCUMENTATION? (Attach a sample copy of each.)

22. PROMOTION

DESCRIBE THE TECHNIQUES YOU WILL USE FOR PROMOTING (ADVERTISING) YOUR SERVICES. (Attach copies of each.)

_____BROCHURE

_____POSTER

_____CATALOG/ANNOUNCEMENT SCHEDULE

_____DIRECT MAIL LETTER

_____MEMBERSHIP ROLL

_____ADVERTISEMENT

_____WORD-OF-MOUTH

_____SPEECHES

_____OTHER, specify____

APPLICATION FOR APPROVAL OF A STATE/MULTISTATE COUNCIL

This application is formatted so that required information can be written in immediately following the question. If this is not enough space or if the information requested already exists in another format, information can be appended to the form. At the specific place in the form, mark "See attached." For each attachment, clearly mark at the to of the page the question number it is answering and a short phrase or key terms to identify the subject of the question. The attachments should be forwarded with the application sequenced numerically to conform with the questions.

FOR INTERNAL USE ONLY

*Date of receipt*________________

*Application #*________________

GUIDELINES AND INSTRUCTIONS

APPLICATION FOR APPROVAL OF A STATE/MULTISTATE COUNCIL

I. TYPE OF APPLICATION

- If the Council is being reviewed for the first time, check Initial Application.
- If the Council is currently approved and this review is to extend or renew the approval, check Re-application. Give the date the current approval was granted.

II. COUNCIL INFORMATION

- Give the name of the state or states represented by the Council.
- Give the name of the Council, its mailing address, and telephone number.
- Give the name of the person who will handle the liaison with the National Council, his/her position title, and telephone number. This may be a staff person or the person with final administrative responsibility, such as, the Chair of the Council.

III. CONSTITUENTS

The following information is requested in order to gain a profile of the groups and individuals that are the constituents of the Council.

APPROVAL OF A STATE/MULTISTATE COUNCIL FORM

I. TYPE OF APPLICATION

INITIAL APPLICATION______

RE-APPLICATION______ DATE OF CURRENT APPROVAL____________________

II. COUNCIL INFORMATION

NAME OF STATE(S)____

____

____

NAME OF COUNCIL____

ADDRESS OF COUNCIL____

______________________________________ZIP__________

TELEPHONE NUMBER______________EXTENSION________

NAME OF CONTACT PERSON______________________________

POSITION TITLE______________________________

TELEPHONE NUMBER______________EXTENSION________

III. CONSTITUENTS

PROFESSIONAL ASSOCIATIONS

STATE CHAPTERS OF NATIONAL ASSOCIATIONS

Fill in chart which follows.

LOCAL CHAPTERS OF NATIONAL ASSOCIATIONS

Fill in chart which follows.

STATE/LOCAL ASSOCIATIONS

Fill in chart which follows.

PROFESSIONAL ASSOCIATIONS

Associations within the state(s) are to listed according to their geographic scope and affilition:
State chapter of a national association
Local chapter of a national association
State/local association not affiliated with a national association
Under each category, the following information is requested.

- Give the name of the association and its mailing address.
- Give the approximate number of members
- State if the association sponsors continuing education activities. If it does, indicate how many activities are offered in a year and the type of activities that are offered. Choose from the following list of activities:
    - Institute
    - Seminar
    - Workshop
    - Internship/practicum
    - Correspondence course
    - Home Study course
    - Mediated learning module
    - Computer-assisted instruction module
    - Programmed text
    - Other, specify.

PROFESSIONAL ASSOCIATIONS

TYPE OF CHAPTER *State* *Local* *None*	NATIONAL ASSOCIATION *Name or N/A*	STATE/LOCAL GROUP *Name and Mailing Address*	NUMBER OF MEMBERS	SPONSORS CONTINUING EDUCATION ACTIVITIES			
				No	*Yes*	HOW OFTEN *Number per Year*	TYPE OF ACTIVITIES

NETWORKS OR CONSORTIA

List any networks or consortia that are organized within the state(s). All types should be listed, not just computer or bibliographic groups.

- Give the name of the organization and its mailing address.
- Describe the type or nature of the organization. This should include the types of libraries involved and the areas of cooperation and types of services provided.
- Give the number of institutions that are members.
- State if the organization sponsors continuing education activities. If it does, indicate how many activities are offered in a year and the type of activities that are offered. (Choose from the types of activities listed under professional associations above.)

LIBRARIES AND LIBRARY SYSTEMS

Provide the number of libraries or library systems within the state(s) that have a substantial staff development/training program. Consider those offerings that are more general, less job specific and would be of value to others not employed by the library. "Substantial" is subjective but represents an organized, on-going, regularly scheduled program.

INFORMATION, LIBRARY, MEDIA EDUCATION PROGRAMS IN A HIGHER EDUCATION INSTITUTION

Education programs are to be approved by the National Council but information as to the number and levels of the education programs in the state(s) contributes to the profile of the number and nature of continuing education offerings available.

- The numbers are requested to be broken down by: (1) level of the program, (2) whether accredited by ALA or not, and (3) whether an information, library, or media program. Note that some institutions may have more than one kind of program and therefore the numbers are for programs, not institutions.
- The assumption is that all programs include the traditional academic offerings for academic credit, e.g., courses, short courses, and academic independent study. Give the number of programs that offer continuing education activities in addition to the academic offerings, such as workshops, institutes, and Home Study courses for Continuing Education Units.

NETWORKS AND CONSORTIA

NAME AND MAILING ADDRESS	TYPE OF ORGANIZATION	NUMBER OF MEMBERS	SPONSORS CONTINUING EDUCATION ACTIVITIES		
			No/ Yes	*Number per Year*	*Type of Activity*

LIBRARIES AND LIBRARY SYSTEMS

NUMBER WITH ACTIVIE STAFF DEVELOPMENT/TRAINING PROGRAMS______________

INFORMATION, LIBRARY, MEDIA EDUCATION PROGRAMS

GRADUATE PROGRAMS

NUMBER OF A.L.A. ACCREDITED PROGRAMS_________

HOW MANY PROVIDE CONTINUING EDUCATION ACTIVITIES__________

NUMBER OF NONACCREDITED PROGRAMS, BY TYPE

_____LIBRARY

_____MEDIA/EDUCATIONAL TECHNOLOGY

_____INFORMATION SCIENCE

HOW MANY PROVIDE CONTINUING EDUCATION ACTIVITIES__________

STATE GOVERNMENT AGENCIES

There are a number of organizational structures at the state government level. The various offices that have responsibility for information, library, media programs and services should be listed. For each unit, provide the following information:

- Give the name of the agency. Include full detail as to its place within the governmental structure, e.g., the department and/or division it is under.
- Give the title of the position of the top administrator of the agency.
- Indicate the type(s) of libraries over which the agency has jurisdiction or responsibilities. Check as many as appropriate.
- Indicate if an employee within the agency has continuing education responsibilities written into the job description. If yes, state the the title of the position and the nature of the continuing education duties assigned.
- State if the agency sponsors continuing education activities. If it does, indicate how many activities are offered in a year and the type of activities that are offered. (Choose from the types of activities listed under professional associations above.)

OTHER CONTINUING EDUCATION GROUPS

Some states have formed joint or ad hoc groups (e.g., committees, councils, task forces) that deal with some aspect of continuing education. Any such group should be listed with the following information:

- Name of the group
- Describe the nature of the group: kind of group, composed of whom, for what purposes.
- Give the number of members, may be persons or organizations.
- Describe the nature of the continuing education activities in which the group is involved.

BACHELORS PROGRAMS

NUMBER, BY TYPE

_____LIBRARY

_____MEDIA/EDUCATIONAL TECHNOLOGY

_____INFORMATION SCIENCE

HOW MANY PROVIDE CONTINUING EDUCATION ACTIVITIES________

ASSOCIATE PROGRAMS

NUMBER, BY TYPE

_____LIBRARY

_____MEDIA/EDUCATIONAL TECHNOLOGY

_____INFORMATION SCIENCE

HOW MANY PROVIDE CONTINUING EDUCATION ACTIVITIES_____

STATE GOVERNMENT AGENCIES

Fill out chart which follows.

OTHER CONTINUING EDUCATION GROUPS

NAME	NATURE OF GROUP	NUMBER OF MEMBERS	NATURE OF CONTINUING EDUCATION ACTIVITIES

STATE GOVERNMENT AGENCIES

Information	*Agency #1*	*Agency #2*	*Agency #3*	*Agency #4*
AGENCY NAME				
TITLE OF ADMINISTRATOR				
RESPONSIBLE FOR:				
PUBLIC LIBRARIES				
ACADEMIC LIBRARIES				
SCHOOL LIBRARIES				
INFORMATION SERVICES				
MEDIA				
EMPLOYEE WITH C.E. RESPONSIBILITIES IN JOB DESCRIPTION *No/ Yes*				
If yes, TITLE OF POSITION				
NATURE OF C.E. DUTIES				
SPONSORS CONTINUING EDUCATION ACTIVITIES *No/ Yes*				
If yes, HOW OFTEN *Number per Year*				
TYPE OF ACTIVITIES				

Some states have requirements for certification. If the state(s) has such a requirement, describe the elements. Include the level of the employee (professional, paraprofessional, technician); the group (public librarians, school librarians, media specialists); how long the certificate is valid; nad if there are continuing education requirements that must be met.

IV. THE ADMINISTRATIVE STRUCTURE OF THE COUNCIL

- State the year the Council was formed.
- Describe the make-up of the Council.

--Give the number of members.

--Give the length of the term of a Council member.

--Are the terms staggered? If yes, describe the pattern of the terms.

--How are the members selected? Indicate if they are chosen or elected and by whom. Describe the nomination process.

--Are members of the Council compensated for their service? Check if they are paid a fee (salary); if only their expenses are paid; or if they are volunteers who receive no monies at all.

--Describe the composition of the current Council. For each member give the following information:

* The individual's name.

* The group or component of the profession he/she personifies, e.g., special librarians, school media specialists, academic librarians, etc.

* The individual's continuing education expertise or specialty, e.g., curriculum design, teaching, media production, evaluation, needs assessment, program administration, etc.

STATE(S) HAVE CERTIFICATION REQUIREMENT

NO________

YES_______ DESCRIBE____

____

____

IV. ADMINISTRATIVE STRUCTURE OF THE COUNCIL

YEAR COUNCIL WAS FORMED________

MEMBERS OF THE COUNCIL

NUMBER________

LENGTH OF TERM________

STAGGERED TERMS NO_____

YES____ DESCRIBE________ ______________________________

____

____

HOW SELECTED____

____

HOW COMPENSATED

_____FEE PAID

_____EXPENSES ONLY

_____NO COMPENSATION

COMPOSITION OF CURRENT COUNCIL

NAME	REPRESENTATIVE OF	CONTINUING EDUCATION EXPERTISE

Continued. . .

- Describe the administrative support for the Council.

  --Check the appropriate type of staff operable.

  --Indicate the approximate number of hours utilized per week.

  --When any other group or agency provides the Council with staff services, describe the nature and extent of this service.

- Describe the financial resources of the Council.

  --Give the dates which comprise the Council's fiscal or operational year.

  --List the Council's total budgeted funds for this year.

    * List the total annual income generated by fees paid to the Council.

    * List the total dollar amount the Council received from state appropriations this year.

    * List the total amount, both cash and services, contributed from other groups or sources this year. Subdivide this figure and list the amount contributed in cash and the amount contributed in service. Identify these contributors.

    * List the total amount assessed from participants this year.

COMPOSITION OF CURRENT COUNCIL, *continued*

NAME	REPRESENTATIVE OF	CONTINUING EDUCATION EXPERTISE

ADMINISTRATIVE SUPPORT FOR COUNCIL

_____ PAID STAFF _____ HOURS/WEEK

_____ VOLUNTEER STAFF _____ HOURS/WEEK

_____ STAFF SERVICES PROVIDED BY ANOTHER GROUP OR AGENCY _____ HOUR/WEEK

SPECIFY WHO AND NATURE OF SUPPORT ______________________________

BUDGET FOR COUNCIL

FISCAL YEAR ____________

CURRENT YEAR'S BUDGET $ ________

AMOUNT GENERATED FROM FEES $ ________

AMOUNT APPROPRIATED FROM STATE $ ________

AMOUNT CONTRIBUTED FROM GROUPS $ ________

CONTRIBUTED AS CASH ______ AS SERVICES ______

SPECIFY GROUPS ______________________________

--List the total budgeted funds that were available to the Council last fiscal or operational year.

--List the total expenses incurred by the Council last fiscal or operational year.

- Describe the nature of the Council.

  --Check whether the Council is an independent entity or is sponsored by or is a component of some parent group or agency.

  --Identify this parent group or agency.

  --Describe how the Council is autonomous or accountable to a parent group in areas such as policy, finances, operations, etc.

V. CRITERIA FOR QUALITY

- Check whether the Council will apply the National Council's Criteria for Quality or its own Criteria for Quality to programs undergoing the approval process.

- If other than the National Council's Criteria for Quality are used or additions, deletions, or changes to the National Council's Criteria for Quality are used, follow the appropriate steps outlined below.

  --Attach a copy of any alternative Criteria for Quality used giving annotations that link each criterion and assessment factor to the appropriate item in the National Council's Criteria for Criteria.

  --Attach a list of criteria and assessment factors from the National Council's Criteria for Quality that are omitted from the alternative criteria used and explain why they are omitted.

BUDGET FOR COUNCIL, *continued*

LAST YEAR'S BUDGET $__________

LAST YEAR'S EXPENDITURES $__________

NATURE OF COUNCIL

_____INDEPENDENT ENTITY

_____SPONSORED. BY WHOM__________

_____COMPONENT OF__________

_____OTHER, *specify*__________

DESCRIBE__________

V. CRITERIA FOR QUALITY

________COUNCIL WILL USE NATIONAL COUNCIL'S CRITERIA FOR QUALITY

________COUNCIL HAS OWN CRITERIA FOR QUALITY

ATTACH COPY WITH ANNOTATIONS THAT LINK EACH CRITERION AND ASSESSMENT FACTOR TO THE PARALLEL POINT IN THE NATIONAL CRITERIA FOR QUALITY.

LIST CRITERIA AND ASSESSMENT FACTORS FROM THE NATIONAL CRITERIA THAT ARE OMITTED FROM LOCAL CRITERIA. EXPLAIN WHY NOT PRESENT.

--Attach a list of criteria and assessment factors unique to the local environment that are used in addition to the National Council's Criteria for Quality.

VI. APPROVAL PROCEDURE

- TYPES OF APPROVAL

  Check each category of continuing education activity you will approve and state for how long such approval will last.

- TYPES OF STATUS

  Check each type of status you will award.

- FORMS

  Attach a copy of each form used, with its accompanying instructions for completion, if these exist, and specify for whom and for what purpose each is intended. Possible forms include applications for review, self-assessment surveys, approval forms, reapproval forms, etc.

PROCEDURES

DESCRIBE THE APPLICATION AND REVIEW PROCEDURES FOR EACH TYPE OF APPROVAL. INCLUDE: FORMS REQUIRED; FEES ASSESSED; VISITS, IF ANY; DEADLINES FOR SUBMISSION; NUMBER OF COUNCIL MEETINGS PER YEAR; REVIEW AND DECISIONS BY MAIL AND/OR TELEPHONE CONFERENCE CALLS, IF APPROPRIATE; RATING SYSTEM FOR JUDGING (EVALUATING) APPLICATION; AND CONDITIONS FOR EACH TYPE OF STATUS.

APPEALS PROCEDURE

COUNCIL HAS AN ESTABLISHED APPEAL PROCEDURE

NO_____

YES____ DESCRIBE

REAPPROVAL

IF THE APPLICATION AND REVIEW PROCEDURES FOR REAPPROVAL DIFFER FROM THE INITIAL PROCEDURES DESCRIBED ABOVE, DESCRIBE.

- MONITORING

Monitoring is valuable throughout the term of approval of any sponsor/provider. Describe how the Council will carry on the monitoring and attach any forms that will be used; for example, annual reports, surveys of participants, evaluative questionnaires, evaluation results, a systematic or random review process.

VII. SUPPORT SERVICES

- PUBLICATIONS

List and attach copies of any publications the Council produces, such as concept papers, bibliographies, instruction booklets, resource packets, calendars, directories, a printed publication list, etc.

LIST CRITERIA AND/OR ASSESSMENT FACTORS THAT ARE UNIQUE TO THE LOCAL CRITERIA.

VI. APPROVAL PROCEDURES

TYPES OF APPROVAL	LENGTH OF APPROVAL
_____PROGRAM OF AN ORGANIZATION	_____
_____SINGLE OFFERINGS	_____
_____LEARNING CONSULTANTS	_____
_____OTHER, *specify*_____	_____
_____	_____

TYPES OF STATUS AWARDED

_____APPROVED STATUS

_____PROVISIONARY STATUS

_____PROBATION STATUS

_____OTHERS, *specify*_____

FORMS

ATTACH A COPY OF ALL APPLICATION FORMS AND INSTRUCTION AND SPECIFY WHO USES EACH AND FOR WHAT PURPOSE.

- PROCEDURES

If printed procedures for use by the applicants exist and they include the following points, attach them in lieu of the description requested here. If not, describe any procedures required of each category of sponsor/provider.

--Identify all forms (samples of which you have already attached to this application.)

--Describe all fees you assess providers, any site visits you might require, and all deadlines providers must meet to submit materials for consideration.

--Describe the method of your deliberations: Will the Council meet in person? If so, how often per year? Will the Council members review applications independently and subsequently convey their decisions by telephone and/or mail.

--

--Describe the particulars of the rating system used for evaluating applications including what totals will constitute each type of status to be awarded.

- APPEALS PROCEDURE

Check whether or not the Council has an established appeals procedure. If printed appeals procedures for use by the applicants exist, attach them in lieu of the description requested here.

--Describe the steps to be followed by a provider who wishes to appeal a status decision or rating rendered by the Council.

--Describe the steps the appeals panel or reviewing authority will follow in its consideration of the appeal.

- REAPPROVAL

Describe how sponsor/providers will apply for reapproval. Include any fees and time schedules required for this function. Will the Council require any additional information beyond that obtained from monitoring during the term of approval?

MONITORING

DESCRIBE ANY TECHNIQUES OR PROCEDURES USED FOR MONITORING THE SPONSORS, OFFERINGS, OR LEARNING CONSULTANTS DURING THE TERM OF THEIR APPROVAL.

Attach copies of any forms or reports used.

VII. SUPPORT SERVICES

PUBLICATIONS

LIST ANY PUBLICATIONS PRODUCED BY THE COUNCIL *Attach a copy of each.*

TITLE	PURPOSE	FREQUENCY	DISTRIBUTION

- PROMOTION

Describe any promotion the Council utilizes, such as brochures, press releases, advertisements, training programs, a speakers bureau, etc. Attach copies whenever possible.

- TRAINING AND SUPPORT SERVICES

This area is broad and very significant for the profession. Discuss any activities the Council itself offers in the furtherance of Quality Continuing Education goals. Some possible areas of activity might include an information clearinghouse, institutes, workshops, on-site visits, and the training of trainers.

PROMOTION

DESCRIBE ALL TECHNIQUES USED TO PROMOTE THE COUNCIL AND ITS WORK INCLUDING GENERAL PROMOTION AND EFFORTS DIRECTED TOWARD GETTING MORE ORGANIZATIONS/ SPONSORS TO APPLY FOR APPROVAL.

Attach copies of brochures, press releases, speeches, etc.

TRAINING AND SUPPORT SERVICES

DESCRIBE ANY TRAINING, CONSULTING, OR OTHER ACTIVITIES PRESENTED BY THE COUNCIL IN THE AREA OF CONTINUING EDUCATION FOR ITS PARTICIPANTS OR THE CONSTITUENCY AS A WHOLE.

DOES THE COUNCIL AWARD CEU'S? YES_____ NO_____

Attach a schedule of activities and announcements and/or brochures for these activities and services.

APPENDIX L

TERMS OF AGREEMENT FOR A SINGLE OFFERING

TERMS OF AGREEMENT FOR AN APPROVED ORGANIZATION

TERMS OF AGREEMENT FOR A LEARNING CONSULTANT

TERMS OF AGREEMENT FOR A SINGLE OFFERING

NAME OF PROVIDER________________________ ADMINISTRATOR/CHAIR________________

SECTION/DIVISION________________________ TITLE________________________

ADDRESS________________________________ TELEPHONE____________________

____

TITLE OF OFFERING____

1. The above single offering has Approved Status as the following type(s) of offering, as a

_____academic course

_____academic independent study

_____internship or practicum

_____Home Study course

_____correspondence course

_____institute

_____workshop

_____seminar

_____short course

_____conference program

_____mediated learning module

_____computer-assisted instruction module

_____programmed text

2. *The above single offering will be repeated (i.e., offered more than one time over the course of more than one year)*

_____*Yes* _____*No*

3. The provider will remit the annual fee

in the amount of $______________
on the following date(s)

	Month	Day	Year
Year 1	_____	_____	_____
Year 2*	_____	_____	_____
Year 3*	_____	_____	_____

* if the offering is repeated

4. The provider will submit an annual report on the appropriate form on the following date(s)

	Month	Day	Year
Year 1	_____	_____	_____
Year 2*	_____	_____	_____
Year 3*	_____	_____	_____

* if the offering is repeated

5. The provider will be eligible to apply for re-approval (if the offering is repeated) on

____
[Month day year]

The application must be received prior to the review cycle deadline which precedes this date.

6. *The provider will participate in the CLENE National Continuing Education Registry as follows:*

_____*full participation*

_____*only complete Course Form for the activity and print Sponsor Code and Course Number and Title on all brochures, application, etc*

_____*completion of forms and printing of information (as above) plus provision of Class Rosters for each time offering is held to the CLENE Registry office.*

7. *The provider will provide information to be published in CLENE's* *__Continuing Education Communicator__* *(A Calendar of Continuing Education Offerings) at least 60 days in advance of the activity.*

_____*Yes* _____*No*

8. *The provider will provide information to be published in CLENE's annual* *__Directory of Continuing Education Opportunities for Library, Information, Media Personnel__* *if the offering is repeated.*

_____*Yes* _____*No*

9. The National Council authorizes the provider to use the official logo and statement designating Approved Status in connection with this single offering when presented as the type(s) indicated in Number 1 above. When the logo and statement are used, the Sponsor Code and Course Number entered in the CLENE National Continuing Education Registry must be printed.

10. The provider will keep the National Council informed on changes in the offering, the adminstrator, and/or the address/telephone number to be used in communications.

11. The provider will notify the National Council if the single offering is to be offered as a different type of offering (besides those checked in Number 1 above) and approval is sought for the new format. The National Council will indicate what additional information is required for review before approval can be extended to the new type. The National Council may ask for an entire application process to be undertaken.

12. The National Council will keep all information submitted by the provider in strict confidence.

13. Approved Status will be effective as of the date that this Agreement is signed. Approved Status is not retroactive.

____
Chair, National Council on Quality
Continuing Education for Information,
Library, Media Personnel

DATE_______________________

____
Administrator of Continuing
Education Offering

DATE_______________________

Appendix L

TERMS OF AGREEMENT FOR AN APPROVED ORGANIZATION

NAME____ ADMINISTRATOR____________________

SECTION/DIVISION____________________________ TITLE____________________________

ADDRESS_____________________________________ TELEPHONE________________________

____

1. The provider has Approved Status for the following types of activities

_____Academic offerings, such as academic courses, academic independent study, internships or practica, education for an advanced degree or certificate

_____Group learning activities, such as institutes, workshops, seminars, short courses, conference programs

_____Individualized programs and activities, such as correspondence courses, mediated learning modules, computer-assisted instruction modules, programmed texts, non-academic internships

_____Home Study courses

2. The provider will remit the annual fee

in the amount of $____________
on the following dates

	Month	Day	Year
Year 1			
Year 2			
Year 3			

3. The provider will submit an annual report on the appropriate form on the following dates

	Month	Day	Year
Year 1			
Year 2			
Year 3			

4. The provider will be eligible to apply for re-approval on ________________________.
[Month Day Year]

The application must be received prior to the review cycle deadline which precedes this date.

5. *The provider will participate in the CLENE National Continuing Education Registry as follows:*

_____*full participation*

_____*only complete Course Forms for each activity and print Sponsor Code and Course Number and Title on all brochures, applications, etc.*

Continued on next page. . .

5. continued

_____ *completion of forms and printing of information (as above) plus provision of Class Rosters for each activity to the CLENE Registry office.*

6. *The provider will provide information to be published in CLENE's Continuing Education Communicator (A Calendar of Continuing Education Offerings) at least 60 days in advance of the activity.*

_____ *Yes* _____ *No*

7. *The provider will provide information to be published in CLENE's annual Directory of Continuing Education Opportunities for Library, Information, Media Personnel*

_____ *Yes* _____ *No*

8. The provider will not apply its Approved Status to any activity it co-sponsors or has under contract unless it assumes total responsibility for the quality of the activity as spelled out in the Provider Approval System volume of the Program document.

9. The provider may use the official logo and statement designating Approved Status in connection with all offerings and activities of the type indicated in Number 1 and meeting the requirement of Number 8 above. When the logo and statement are used, the Sponsor Code and Course Number entered in the CLENE National Continuing Education Registry must be printed.

10. The provider will keep the National Council informed on changes in the administrator and/or the address/telephone number to be used in communications.

11. The provider will notify the National Council if new types of activities (besides those checked in Number 1 above) are to be offered and approval is sought for these offerings. The National Council will indicate what additional information is required for review before approval can be extended to the new types of activities.

12. The National Council will keep all information submitted by the provider in strict confidence.

13. Approved Status will be effective as of the date that this Agreement is signed. Approved Status is not retroactive.

____
Chair, National Council on Quality
Continuing Education for Information,
Library, Media Personnel

DATE______________________

____
Administrator of Continuing
Education Program

DATE______________________

TERMS OF AGREEMENT FOR A LEARNING CONSULTANT

NAME ____

ADDRESS ____

____

TELEPHONE ______________________

1. The Learning Consultant has Approved Status as a

_____Mentor in any subject area or discipline at the following level(s) of instruction:

- _____overview/summary
- _____state-of-the-art survey
- _____refresher/review
- _____basic instruction
- _____intermediate instruction
- _____advanced instruction
- _____issues, problems, trends;

_____Subject matter specialist at specific levels of instruction as follows:

2. The Learning Consultant will remit the annual fee

in the amount of $______________
on the following dates

	Month	Day	Year
Year 1	_____	_____	_____
Year 2	_____	_____	_____
Year 3	_____	_____	_____

3. The Learning Consultant will submit an annual report on the appropriate form on the following dates

	Month	Day	Year
Year 1	_____	_____	_____
Year 2	_____	_____	_____
Year 3	_____	_____	_____

4. The Learning Consultant will be eligible to apply for re-approval on

______________________.
(Month Day Year)

The application must be received prior to the review cycle deadline which precedes this date.

5. *The Learning Consultant will participate in the CLENE National Continuing Education Registry as follows:*

    _____*full participation*

    _____*providing the client/learner with the sponsor code and course number and title information.*

6. *The Learning Consultant will provide information to be published in CLENE's Continuing Education Communicator (a calendar of continuing education offerings) "List of Approved Learning Consultants".*

    _____*Yes*   _____*No*

7 *The Learning Consultant will provide information to be published in CLENE's annual Directory of Continuing Education Opportunities for Library, Information, Media Personnel.*

    _____*Yes*   _____*No*

8. The Learning Consultant may not apply his/her Approved Status to a group learning activity or individualized program or activity he/she may sponsor or develop. The National Council must receive a separate application for review either for a single offering or for an "organization" to cover numerous programs and activities.

9. The National Council authorizes the Learning Consultant to use the official logo and statement designating Approved Status in all communications in connection with all services and activities of the type indicated in Number 1 above. When the logo and statement are used, the sponsor code entered in the CLENE National Continuing Education Registry must be printed.

10. The Learning Consultant will keep the National Council informed on changes in the address/telephone number to be used in communications.

11. The Learning Consultant will notify the National Council if a change is sought in the scope of services (subject areas and/or levels of instruction) to be offered that differes from those checked in Number 1 above. The National Council will indicate what additional information is required for review before approval can be extended.

12. The National Council will keep all information submitted by the Learning Consultant in strict confidence.

13. Approved Status will be effective as of the date that this Agreement is signed. Approved Status is not retroactive.

____
Chair, National Council on Quality
Continuing Education for Information,
Library, Media Personnel

DATE____________________

____
Learning Consultant

DATE____________________

APPENDIX M

NATIONAL COUNCIL ON QUALITY CONTINUING EDUCATION FOR INFORMATION, LIBRARY, MEDIA PERSONNEL

PROVIDER APPROVAL SYSTEM EVALUATION FORM

- M-2 -

NATIONAL COUNCIL ON QUALITY CONTINUING EDUCATION FOR INFORMATION, LIBRARY, MEDIA PERSONNEL

PROVIDER APPROVAL SYSTEM EVALUATION FORM

NAME OF PROVIDER ______________________________ ADMINISTRATOR/CHAIR ____________________

SECTION/DIVISION ______________________________ TITLE ____________________

ADDRESS ______________________________ TELEPHONE ____________________

____

TITLE (IF SINGLE OFFERING) ____

CATEGORY OF APPROVAL:

____ Organizational ____ Single Offering ____ Learning Consultant ____ State/Multistate Council

INITIAL APPROVAL ____ RE-APPROVAL ____

COUNCIL MEMBER ______________________________

DATE ____________________

Appendix M

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
CRITERIA FOR CONTINUING EDUCATION PROGRAMS AND ACTIVITIES		
Group Programs and Activities		
Needs Assessment		
CRITERION 1: *The specific needs of the client group have been assessed.*		
Assessment Factors:		
1. Has the target group been clearly identified?		
2. Has a systematic needs assessment been conducted?		
3. Have representatives of the target group participated actively in the needs assessment process?		
Objectives		
CRITERION 2: *Specific, measurable, and/or observable learning objectives have been stated in one or more of the following areas: (1) changes in attitude and approach to the solution of problems; (2) acquisition (or mastery) of new knowledge or the revision of outdated knowledge in specific skills, techniques, and procedures.*		
Assessment Factors:		
1. Are the objectives based on the needs assessment?		
2. Do the objectives describe the expected outcomes for the participants?		
3. Are the objectives measurable/observable?		

E = Exemplary*
NI = Needs Improvement*
NA = Not Applicable
* Requires Comments

A = Adequate
NM = Needs More Information*
U = Unsatisfactory*

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
4. Do the objectives address changes in the participant's work performance as a basis for evaluating impact?		
Design and Presentation		
CRITERION 3: *The program is systematically designed and delivered to meet the statement of objectives.*		
Assessment Factors:		
1. Are the instructional strategies, i.e., learning experiences, teaching methods, and content materials appropriate and effectively employed in achieving the objectives?		
2. Are person(s) knowledgeable in the content area as well as instructional design involved in planning and conducting the educational offering?		
3. Does the design consider the participant's entry level compentency?		
4. Is sufficient time allotted for the participant to meet the objectives?		
5. Is consideration given to individualization, such as learning styles, pacing, and assimilation rate?		
6. Are principles of adult education, including involvement, self-direction, and reinforcement included in the design of the program?		
Timeliness		
CRITERION 4: *The program content is current and timely.*		
Assessment Factors:		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
1. Are the concepts presented up-to-date with the current ideas, trends, facts, etc.?		
2. Is the program content reviewed periodically to assure it is accurate and consistent with currently accepted practices and techniques?		
Promotion		
CRITERION 5: *The educational offering is promoted responsibly.*		
Assessment Factors:		
1. Is the promotion directed at the audeince that may best benefit from the activity?		
2. Does the promotional material include the following:		
a. the scope of the subject content		
b. a statement of the objectives in terms of learner outcomes		
c. the nature of the target audience		
d. the level of the offering, i.e., beginning, intermediate, advanced, or overview		
e. the location, time, and schedule of activities		
f. the name(s) and qualifications of the presentor(s)		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
g. the cost, the items covered by the cost, and provisions for refund		
h. the amount and kind of credit being offered		
i. the provision of a systematic process to record the continuing education activities of the individual participants		
j. the preparation, if necessary, which participants should engage in prior to the program		
k. a description of the learning activities, methods, and resources used in the program?		
Evaluation		
CRITERION 6: *Evaluation is an on-going and integral part of the education offering.*		
Assessment Factors:		
1. Is the evaluation based on the stated objectives?		
2. Does the evaluation cover the starting point, the process, and the outcomes of the learning experience, i.e., pre-test, interim test, and post-test?		
3. Do the evaluation procedures include provision for adjusting the program in response to new needs identified during the course of the program?		
4. Does the evaluation assess the appropriateness of the content as well as the effectiveness of the materials and techniques employed?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
5. Does the evaluation include the performance of the presentors and staff?		
6. Does the evaluation include adequacy and appropriateness of the facilities?		
7. Where confidential or sensitive materials or results are involved, does the evaluation process take into consideration ethical handling of these items?		
8. Have the evaluation procedures been reviewed by a qualified, unbiased person?		
9. Are the evaluation results made known to the participants?		
10. Are evaluation results used to improve future programs?		
11. Does the evaluation process clearly indicate that the participants has the right to express grievances or report unethical procedures?		
Individualized Programs and Activities		
Needs Assessment		
CRITERION 1: *The individual's specific learning needs or interests have been identified and assessed.*		
Assessment Factors:		
1. What needs assessment process has been followed, e.g., self-assesment?		
2. What are needs or interests based upon, e.g., job, career growth, personal interest, etc.?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
3. Are colleagues consulted or outside resources utilized in determining needs?		
Objectives		
CRITERION 2: *Based on the self-assessment, a set of clear, measurable, and/or observable learning objectives have been stated in one or more of the following areas: (1) changes in attitudes, (2) updating of outdated knowledge and/or attainment of new knowledge, and (3) awareness or mastery of specific skills and techniques.*		
Assessment Factors:		
1. Are the objectives clearly stated?		
2. Are the objectives appropriate in meeting the assessed needs?		
3. Will the objectives contribute to the competence of the individual?		
4. Are the objectives reasonable and attainable given the individual's current expertise and the available resources and time?		
5. Do the objectives specify the expected outcome for the individual in terms of the level of knowledge or performance skill that is expected to be attained?		
6. Are the objectives stated so they can be evaluated? How will the individual know or be able to demonstrate achievement of each objective?		
7. Do the objectives address changes in future role performance of the individual as a bsis for evaluating impact?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
CRITERION 3: *The learning objectives are relevant to improved information, library, media services.*		
Assessment Factors:		
1. Is the content related to present and future responsibilities?		
2. Are the skills relevant to present and future responsibilities?		
3. How has relevancy been determined?		
Learning Plan		
CRITERION 4: *An organized and coherent series of learning activities is systematically planned to achieve the individual's stated objectives?*		
Assessment Factors:		
1. Are learning activities appropriate to the objectives?		
2. Do the activities utilize appropriate materials, resources, or persons expert in the content/skill area?		
3. Are learning activities organized, sequenced, and paced so as to be manageable and to build effectively upon each other?		
4. Are appropriate and effective individual educational strategies/techniques employed?		
5. Are the activities at the appropriate level for the individual's competency base?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
CRITERION 5: *The individualized learning activities are carred out in a timely, responsible, and effective manner following the learning plan.*		
Assessment Factors:		
1. Has the plan of activities been followed?		
2. Are resources and experts utilized as planned?		
3. Is adequate time allocated to achievement of the objectives of each activity?		
EVALUATION		
CRITERION 6: *Evaluation is an on-going and integral part of the individualized continuing education activity.*		
Assessment Factors:		
1. Is the evaluation based on the stated objectives?		
2. Does the evaluation cover the starting point, the process, and the outcomes of the learning experience?		
3. Does monitoring provide opportunity for reassessment of objectives and adjustment of the program in light of newly realized needs/interests or unrealistic expectations?		
4. Do the monitoring and evaluation look at appropriateness of the content and resources and the effectiveness of learning strategies?		
5. Do monitoring and evaluating effectively assess the individual's level of achievement of the objectives and provide opportunity for corrective efforts?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS

6. Is the monitoring and evaluation process carried out with appropriate review, assessment, or consultation with a qualified, unbiased person?

Instructional Materials

Entry Level Competencies

CRITERION 1: *The instructional materials are suited for the learning audience.*

Assessment Factors:

1. Is the stated level of the instructional material the same as the learning audience, e.g., beginner or novice, moderate-level, or expert?

2. Is there a list of entry level competencies for the instructional materials and/or a test of these competencies?

3. Is there a list of terms or jargon that must be known before the instructional materials can be used?

Objectives

CRITERION 2: *A set of clear, measurable, and/or observable learning objectives have been stated in one or more of the following areas: (1) changes in attitude; (2) updating of outdated knowledge and/or attainment of new knowledge; and (3) awareness or mastery of specific skills and techniques.*

Assessment Factors:

1. Are the objectives measurable/observable?

2. Do the objectives specify the expected outcome for the individual in terms of the level of knowledge, attitude, or performance skill that is expected to be attained?

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
Learning Strategies		
CRITERION 3: *The instructional materials utilized are suitable and appropriate for the objectives of the learning activity.*		
Assessment Factors:		
1. Are several types of media used to accommodate different learning styles and preferences?		
2. Is a variety of media used to stimulate the participant's interest and motivation?		
3. Are the instructional materials suitable for the chosen mode of instruction, large-group, small-group, or independent study?		
4. Are the instructional materials used for a variety of purposes: to set a mood or foster an attitude, to present facts, to illustrate or augment existing facts, to summarize a topic, or to evaluate or test learning?		
Timeliness		
CRITERION 4: *The instructional materials are current and timely.*		
Assessment Factors:		
1. Are the concepts presented up-to-date with the current ideas, trends, facts, etc.?		
2. Are the illustrations timely:		
a. appropriate to the historical period covered, or		
b. reflective of today's culture, styles, and equipment?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
3. Is the production date or revision date explicity listed?		
Learning Environment		
CRITERION 5: *The instructional materials are utilized in an appropriate facility and learning environment.*		
Assessment Factors:		
1. Is the size of the room appropriate for the instructional material?		
2. Is the lighting adequate for the instructional media?		
3. Is the layout of the room appropriate for the instructional media?		
4. Is the room equipped with the necessary electrical wiring, sound system, screen(s), and furniture to accommodate the equipment used by the instructional materials?		
Package or Module Design		
CRITERION 6: *An instructional material package (or module), whether produced or purchased, is a complete and integrated unit and is well documented.*		
Assessment Factors:		
1. Is there a statement of objectives for the material?		
2. Is the target audience identified?		
3. Are the credentials of the subject matter experts provided and are they satisfactory?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
4. Is evidence supplied that the producer tested and revised the material? Are the characteristics of the trial group sufficiently similar to this group of participants?		
5. Is the technical quality adequate so there is good clarity, accurate exposure, synchronization, no distortion, etc.?		
6. Does the presentation of the content match the attributes of the medium?		
7. Is there an instructor's kit which includes		
a. an instructor's guide		
b. questions for discussion		
c. additional problems or exercises		
d. materials for display or demonstration		
e. copies of visuals and audio materials used in the audiovisual program		
f. additional or supplemental materials for distribution?		
8. Is all equipment needed to utilize the instructional materials standard, or, if not, are specific hardware specifications given?		
9. If developed as a self-instructional package, is there a learner's kit which includes		
a. a set of instructions		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
b. a list of learning goals and objectives		
c. a workbook or other types of problems or exercises		
d. copies of visuals and audio materials used in the audiovisual program		
e. evaluation instruments, both interim and final		
f. additional or supplemental material		
g. suggestions for enrichment or further study?		
CRITERIA FOR CONTINUING EDUCATION PROVIDERS		
Provider Criteria for Group Activities		
Administration		
CRITERION 1: *A structure for systematic administration of the continuing education programs is established.*		
Assessment Factors:		
1. Is one individual assigned the ultimate responsibility for administering the program?		
2. Is the assigned individual qualified to carry out his/her responsibility by virtue of background and experience?		
3. Is there continuity of administration?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
4. Is there evidence of careful long range planning for the overall program?		
Human Resources		
CRITERION 2: *Continuing education presentors, designers, and other human resources demonstrate current expertise by training and experience in the pertinent subject matter and/or educational methodologies.*		
Assessment Factors:		
1. Are the presentors and human resources adequate in number for the type of learning method used?		
2. Do the human resources have expertise, not only in subject matter, but in setting educational objectives, teaching, and assessment of educational results of the program?		
3. Do the presentors have the ability to facilitate learning and communicate?		
4. Are appropriate adult education methods used in the program?		
Facilities		
CRITERION 3: *Adequate facilities conducive to good learning are desirable for effective continuing education programs.*		
Assessment Factors:		
1. Is there appropriate and sufficient space for the educational methods used, including learner participation?		
2. Do facilities include pertinent and adequate library resources, space for conferences, audiovisual equipment, and other resources as needed?		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
Budget		
CRITERION 4: *The budget is adequate to support the educational program.*		
Assessment Factors:		
1. Is there evidence of sound fiscal planning and management, e.g., a clearly identifiable component of the total budget earmarked for continuing education?		
2. Does the budget include (as needed), the following:		
a. clerical and secretarial services		
b. audiovisual and other pertinent equipment		
c. supplies and promotional materials		
d. travel and other related costs?		
3. Have financial resources to augment participant fees been sought to support the program?		
Criteria for Learning Consultants for Individualized Continuing Education Programs		
CRITERION 1: *The Learning Consultant is able to demonstrate competence in planning and evaluation of education programs, especially those involving individualized learning.*		
CRITERION 2: *The Learning Consultant has knowledge or access to expertise in the specialty area being pursued by the individual learner.*		

CRITERIA/ASSESSMENT FACTORS	RATING	COMMENTS
CRITERION 3: *The Learning Consultant has an articulated plan as to*		
a. *the content areas and level of training he/she is qualified to supervise*		
b. *the kind of advisor services he/she is prepared to give*		
c. *the general model that will be followed in the assessment of learning needs and the development, monitoring, and evaluation of activities.*		
CRITERION 4: *The Learning Consultant will assume the ultimate responsibility for the attainment of the individual participant's learning goals.*		
CRITERION 5: *When an organization or association makes available the services of Learning Consultants, each individual Learning Consultant has been approved.*		